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Advisory services resource pack for Organisations of Persons with Disabilities (OPDs):

Resource 6: Monitoring and reporting

This resource covers the process of monitoring and reporting on the delivery of advisory services, either while the services are being delivered or on completion of the work.

Prepared by the Inclusion Advisory Group (IAG) of CBM Global Disability Inclusion, with input from the Pacific Disability Forum.

Monitoring and reflecting on progress

Monitoring progress is important to help organisations of persons with disabilities (OPDs) keep track of how work is going. Monitoring reports are often also a requirement of a client/partner who wants a record of how their money was spent. They can also be a useful tool for recording what was done and why and reinforcing key lessons and recommendations. OPDs will need to dedicate time and effort to monitoring their advisory work.

Those delivering advisory services may monitor their own efforts, the quality of the work they are undertaking, and the quality of the partnership with the contracting organisation. Preferably, this monitoring effort will be part of the OPD's broader ongoing monitoring process, so there is an integrated approach and lessons learned are being shared across the organisation. This helps where there are multi-year services provided and where there is staff turnover within OPDs.

Some advisory clients may specify their own indicators or measures that they want to monitor through the work they are funding and may request OPDs to collect this information. For example, they may want to track the number of people attending a training workshop. It may help to clarify with the client whether it is the OPD or the client who would be responsible for collecting this data.

Beyond this, monitoring the delivery and outcomes of advisory services can generate important information for an OPD to use to help reflect on how their work is going, whether it is achieving the intended outcomes, and what could be done to further strengthen advisory services in the future.

Tool 6.1 provides some key questions that may help OPDs to monitor and reflect on progress against their plans to deliver advisory services. Answers to these questions may also help in reporting to contracting organisations.

Reporting on advisory work

OPDs are generally experienced in providing reports to donors about projects undertaken with funds received, and lessons from these experiences will contribute to reporting on the provision of advisory services. Some differences may be found between reporting on advisory services and more general projects. For example, advisory services may not be as easy to describe. As well as documenting evidence of progress, reports can also capture lessons learned along the way about providing advisory services.

At the end of a contract, clients may ask OPDs for a completion report. The expectation is usually to provide a summary of what was done, what was achieved and key recommendations going forward. They can be useful in explaining why a certain approach was taken and what was learned in the process, for example, if not enough time or resources were available to complete a complex task. These reports can be a useful record for OPDs, given that other contracts may arise in future, and other staff may be involved. **It is a good idea to factor in the time needed to write reports into the contract at the beginning.**

A monitoring report can include a variety of headings and content, depending on the contract and the OPD's own preferences. Some contracting organisations will specify which style of report they want and what should be included. If you want to vary that style (for example by filming a meeting and submitting the video, rather than submitting a written document), then it always best to discuss this in advance and get approval.

Tool 6.2 provides a draft template to help structure a report on advisory services that have been delivered.

Tips for writing reports

The following tips may help guide OPDs in drafting reports on advisory services:

- Tailor the style and content of the report for its audience. Ask: Who am I writing this report for?
- Identify the purpose of the report, and draft the content based on this purpose. For example, is the purpose to record what was done? To record what was achieved? To reinforce what has been learnt? To provide key recommendations and next steps? To share resources with others?
- A short summary is usually preferred over a long document with lots of detail about what, when, where, why, and how it was done. Any details can be included in annexes. For example, an annex might include an outline of a training course or a field visit program/schedule or a list of people consulted.
- It is useful to include a brief outline of any issues that arose and changes to original plans, plus an explanation for the changes.
- It is often more helpful to document what was achieved than what was done. For example, instead of just writing 'we ran an awareness workshop for 30 people', you could write about what people learned as a result of the workshop and what they told you they might do differently as a result of attending. Or for example, instead of writing 'we visited X province,' you could write about the new relationships that were built and how the meetings you had are expected to contribute to new possible partnerships.
- Include evidence for what was achieved as much as possible. For example, if you delivered a training course, you could include lessons learned and feedback from participants about how useful they found the training and their views on what they have learned.
- Recognise that some advice will be listened to in meetings, and other advice may be ignored or be less of a priority. Written reporting can provide another opportunity to repeat or highlight important advice.
- Use a mix of methods to communicate information in reports. For example, some organisations will be happy to receive short videos of people speaking, some like to see information presented in graphs or pictures, and some will ask for summary rather than detailed information. It is best to discuss and agree on the preferred style of reports in advance.

- The writing style used by OPDs will depend on their own preferences and context, but here are some suggestions that may be helpful:
    - Try to present advice as largely helpful, contextual, factual, and neutral, rather than too judgemental or critical.
    - The expression of ideas should be diplomatic but accurate.
    - Written reports and advice could be read by a broader audience than the original intended people, so it is a good idea to document things expecting others may read the report. If there are issues that are sensitive, it may be best to talk about them rather than write them down in reports.
    - Strengths-based language may be more effective than critical language in bringing about change in client organisations. For example, writing ‘further capacity development on inclusive M&E would be beneficial’ instead of ‘staff capacity on inclusive M&E was poor’.
    - Reports will be more effective in communicating messages if the language, format, tone, and sense are consistent and concise. Asking for others’ help with, or review of, written reports can be useful.
    - Provide constructive recommendations and solutions for specific groups or targets, rather than just pointing out problems. For example, ‘it was reported that some women with disabilities found the focus groups confronting and had difficulty sharing their thoughts and experiences. In future, encouraging women to bring a support person if they want could be considered, and field workers could spend time ahead of the meeting talking with women with disabilities to understand any concerns or dynamics to be considered in facilitation of the group.’

Financial reporting

OPDs are often required to report on financial aspects of a project. This involves accurate and evidence-based data about the costs involved, including staff time, costs of travel, reasonable accommodations, and other expenses. OPDs are generally confident in financial reporting, although they are often challenged by the requirements of different organisations in terms of the formats required, including when funding is provided in other currencies.

As is the case for other contracted work, OPDs are commonly expected to provide regular reports on planned vs actual expenditure and report on issues affecting progress or variations to original plans. This may include timesheets, invoices or other evidence of the work undertaken. Financial reports may also need to be audited for transparency and accountability, with auditing costs included in the contract.

Financial systems in contracting organisations are often complex and demanding of small organisations, so OPDs may want to ask for advice and support in completing forms. This may also provide opportunities to ensure that a client's financial systems are accessible.

Tool 6.1: Questions to monitor and reflect on progress

The key questions below may help OPDs to monitor and reflect on progress against their plans to deliver advisory services.

- Is this work still aligned with the OPD's interests? If so, how? If not, can we shift the focus, so it is more relevant to the OPD's interests?
- Are we doing what we planned or meeting expected targets?
- Are we achieving what we expected? What indicators or measures for gathering evidence do we have?
- What are we learning about what we do and how we do it?
- Have the circumstances changed due to natural disaster, pandemic, etc. and does this have implications for our work or our partnerships?
- Do we need to change what we are doing and how we approach our work?
- Are we using the level of resources we expected, or more or less?
- Based on our reflections and learning, do we need to change our plans and what we do next?
- Who should we communicate to regarding (the above points) and how best should we communicate this?

Tool 6.2: Template for advisory services report

The template below can be used to help structure a report on advisory services that have been delivered. This report could relate to a specific task or component of work (e.g., a training workshop) or to a whole project or series of tasks that have been contracted.

Background

- What were you asked to do?
- Is there are past or ongoing relationship between the OPD and contracting organisation?
- What were the objectives of the assignment?

Overall summary of the task

- What were the expected tasks and processes?

Summary of activities

- What was actually undertaken (refer to annexes for more details)?
- What types of advice were provided, what topics were covered and what approaches were used?

Summary of outcomes

- What was achieved as a result of the advisory services work?
- What indicators are used and what evidence is available to confirm these results?

Key recommendations

- These answer the question ‘so what?’ in terms of what came out of the advice provided. E.g., what do you recommend to the client as the next steps that should be done?

Annexes

- Such as TORs, course outlines, materials shared, collation of feedback data, pre/post assessment data summaries, photo and video documentation.