What to Include in Activity Summaries

At the conclusion of an intervention or evaluation activity, it's a good idea to document how things went so that your project can replicate the activity in the future and report on progress toward the objective. Describe the **WAHU** factors:

> > **WHY** was the project doing the activity? What was it supposed to accomplish?
> > What did the **ACTIVITY** consist of? Who was involved/targeted? When and where did the activity take place? What were the main talking points? What materials were used/shared? What tactics were employed?
> > What **HAPPENED** during/as a result of the activity? What reactions or support did it provoke?
> > What **UTILITY** did the project have for the objective? How did the activity support/inform next activities?

For some activities, a few sentences will suffice; others will require more depth and detail. (See examples on website)

Tracking and reporting of activities happens at five different levels:

I. **Internal progress tracking** (by the project) – Every activity in the work plan should be tracked on some type of project management platform (e.g., Word, Excel, Gantt chart, Trello or SmartSheet) to ensure that all of the deliverables are met. The notation could show when an activity is completed or also include a few outcomes.

II. **Internal activity summary** (for project eyes only) – After each intervention and evaluation activity is completed, have project staff or evaluator(s) write a summary that describes dates, locations, target audiences, tactics used, and level of success. This internal record becomes a roadmap for how the activity can be replicated, but it also forms the basis of progress reports and final or brief evaluation reports. CAUTION: Before sharing this info outside the project, remove all personal identifiers—such as individuals' names or contact information.

III. **Progress report narrative** (for the PC/CTCP) – Every six months, the project needs to describe advancement towards its objectives in progress report narratives in OTIS. The narrative (typed or pasted into the Progress Report Comment data field) should be a brief recap of what work has been done on the activity in that period and what still needs to be done. Drawing from the project's internal activity summary report, **in a few sentences** provide key details such as dates, length, topics covered, materials used, number attended, etc., as well as next steps for completing the activity. Don't list all of your results here. Instead, upload the public version of the activity summary report (with any personal identifiers removed) as a tracking measure or additional document (see item IV). If your program consultant (PC) wants more detail, s/he can find it there.

IV. **Progress report tracking measure** (for the PC/CTCP) – Your workplan also stipulates which materials should be uploaded into OTIS vs. merely kept on file to document work on the objective. When it comes to reporting the specifics of project activities, don't reinvent the wheel! Aside from copies of materials or instruments used, public versions of the same activity summary reports project staff or evaluators wrote to record organizational progress can serve as tracking measures. Just be sure to remove any personal identifiers from the version you upload into OTIS. Mention people's roles instead of individual names (e.g., the mayor of Emerald City). Even if not required in your plan, you can upload after action reviews or other summaries that encapsulate the details of intervention activities as additional documents. That way everything is archived in an easily accessible place.

V. **Final or Brief Evaluation Reports** (for the project, other projects, TCEC, ROVER and CTCP) – At the end of the project cycle, use the project activity summaries to think through how each activity contributed to the objective. In your brief or final evaluation report, apply a 'meta' perspective (analytical overview) to describe how certain activities proved to be pivotal in the progress (or obstacles) toward the objective. Drawing from existing activity summaries, provide just enough detail to make linkages between activities and lessons learned (and applied). No need to touch on every intervention and evaluation activity. (See new *Tell Your Story* guidelines)