

How to Evaluate Progress and Report Regularly

Establishing a Regular Review Process

The final step in the planning process is to establish a regular review process to monitor progress toward annual campaign goals. Regular reviews are necessary to ensure plan accountability and long-term success. They provide the opportunity to evaluate campaign strategies and determine what is working or not working, and where it may be necessary to change tactics to improve results. Reviews can also help identify areas of risk and help you develop contingency plans to ensure the team has the resources and support needed to move forward.

The format and timing of campaign reviews will vary based on program plans and priorities. The stakeholders, data, and other inputs needed for each review may also differ based on your scope of work. This document contains reporting best practices and key questions to help you establish processes to evaluate and report campaign progress.



Before You Begin

The following inputs are needed to evaluate and report on campaign progress:

- Progress toward annual campaign plan, milestones, and timeline
 - Updated federal nutrition program participation data for the current program year as applicable to your plan
 - National School Lunch Program
 - School Breakfast Program
 - Child and Adult Care Food Program – At-Risk Afterschool Meals
 - Summer Meals Programs (Summer Food Service Program + Seamless Summer Option)
 - Updated program and/or participation data for nutrition education as applicable to your plan
 - Spending and fundraising progress related annual campaign budget
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Developing a Review Process and Schedule

It is important to establish a formal review process at the beginning of each campaign year. When determining what will work best for your campaign, think about the frequency, timing, and participants needed to effectively evaluate progress.

Key Questions

- How often will you need to conduct a formal progress review? Depending on strategies and the scope of your campaign, quarterly or semi-annual reviews are recommended, in addition to a deeper annual review/planning process. In between formal reviews, you should also hold regular check-ins with campaign staff and on-the-ground partners and stakeholders to ensure work is progressing according to plan.
- When should the reviews take place? The timing of data and other review components will likely drive your review timeline. For example, if you have established a data sharing relationship with your state agency and they are providing program participation data in the first month of each quarter, you may need to wait to hold your review until after the data is received and you have had time to review and analyze results.
- Who will attend your reviews? This is an opportunity to integrate both internal and external stakeholders, but it is critical to make sure the review is a safe space where the team can take a candid look at what is not working and make adjustments.

Creating Reporting Templates

You will also need to determine how to document and report progress. Many No Kid Hungry campaigns create reporting templates to ensure complete and consistent reviews. Your review documentation should compliment the strategies, tactics, and milestones in your annual plan. You will also need to regularly review campaign finances and fundraising. Keep in mind the needs of your organization or other factors such as funder requirements may dictate the specific format and level of detail needed.

Sample Plan Review Template

PROGRESS TO GOALS

Breakfast: We are on target to reach our goal.

- We are working on District MOUs with several large school districts across the state, including [redacted] charter school that educates approximately 15% of all city high school students and to implement Breakfast After the Bell in 18 schools would add approximately **1,000** kids over the school year.
- [redacted] Public Schools is implementing Breakfast After the Bell in all high schools—167 schools adding approximately **7,000** additional kids over the school year.

UPDATES: TACTICS IMPLEMENTED & IMPACT THIS QUARTER

Breakfast:

- AWARENESS:** Generating excitement/maintaining positive messaging around the breakfast mandate
 - We are developing a multi-pronged communications plan that focuses on:
 - Highlighting successes and positive stories in [redacted]
 - Preventing opt-outs in school districts

Sample Budget Review Template

Expense Type	Year 1 Budget	Spend Progress		Fundraising Progress	
		Total Spend (\$)	Total Spend (%)	Total Funded (\$)	Total Funded (%)
Staff	247,000	123,500	50%	247,000	100%
Collaboration	59,150	15,971	27%	17,745	30%
Breakfast	58,750	25,263	43%	44,063	75%
Summer	15,000	-	0%	12,000	80%
Afterschool	18,000	10,800	60%	18,000	100%
Total	\$ 397,900	\$ 175,533	44%	338,808	85%

Sample Campaign Data Review Template

Target Area	Year 0 Baseline			Year 1 Progress			Change Kids Added to Breakfast
	F/R Lunch ADP	F/R Breakfast ADP	Breakfast %	F/R Lunch ADP	F/R Breakfast ADP	Breakfast %	
Kent	18,563	6,542	35%	18,792	7,893	42%	1,351
New Castle	36,982	21,056	57%	36,955	21,434	58%	378
Sussex	24,556	11,004	45%	23,998	11,735	49%	731
Total	80,101	38,602	45%	79,745	41,062	51%	2,460

Evaluating Progress

A successful campaign review requires a variety of data and information. You should assess your progress based on current program participation data, updates on work in campaign target areas and progress toward planned milestones and goals, campaign financials, fundraising data, and other factors as needed.

Considerations

- Progress to plan. Think about the work completed to-date. Are you on track to achieve your annual goals? Have campaign milestones been completed according to the timeline set forth in your plan? Has anything changed within your campaign or in the external environment that could impact your speed or ability to make progress? Are there any risks or barriers? Is there anything you could utilize to propel your campaign work forward (e.g. new champions, environmental factors, new policy/mandate, etc.)
- Changes in participation. Analyze federal nutrition participation rates for each program applicable to your campaign. Have you made progress toward the No Kid Hungry guideposts? Are more children participating? Are more meals being served? Look specifically at the participation in your target areas and target schools.
- Campaign finances. Review campaign spending to-date. Are monthly expenses in-line with your budget? Are you spending according to plan? You will also need to assess fundraising progress to-date. Have you built a strong, sustainable pipeline of funding? Will you have enough money to complete the annual campaign plan? Are you likely to have a major deficit or surplus in any area?

Using Data and Information to Make Decisions

The final step in the process is to determine confidence in reaching annual campaign goals.

- Green – on track; no adjustment necessary.
- Yellow – concerned; additional support or reassessment of strategies is needed.
- Red – unlikely; significant change needed.

Depending on your assessment, it may be necessary to evaluate other factors or make certain decisions to help move the campaign forward.

- Risks – identify any areas that are at risk and develop contingency plans.
 - Campaign tactics – it may be necessary to adjust work plans or shift the sequencing of work to improve results. Be sure to keep in mind your long-term bold goals to ensure you remain on track to achieve the No Kid Hungry goals in your community.
 - Resource allocations – ensure the team has the appropriate resources and support needed to implement the plan. If you adjusted your plan, new or different resources may be needed.
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