INL DevResults User Guide: Data Review and Approval Using the Paper Performance Report (INL Users)

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### Introduction

This guide describes:



Process and reviewer roles (old and new)



New format for paper Performance Reports



How to review a paper Performance Report, and where DvR fits into the process

## Roles: What is the Same and What is Different?

### Same:

- **Basic review process:** Implementing partner sends a document to INL program manager; INL program manager reviews document and provides comments/feedback
- **System of record:** Implementing partner sends approved report documents to emails/systems of record as required by the official agreement

### Different:

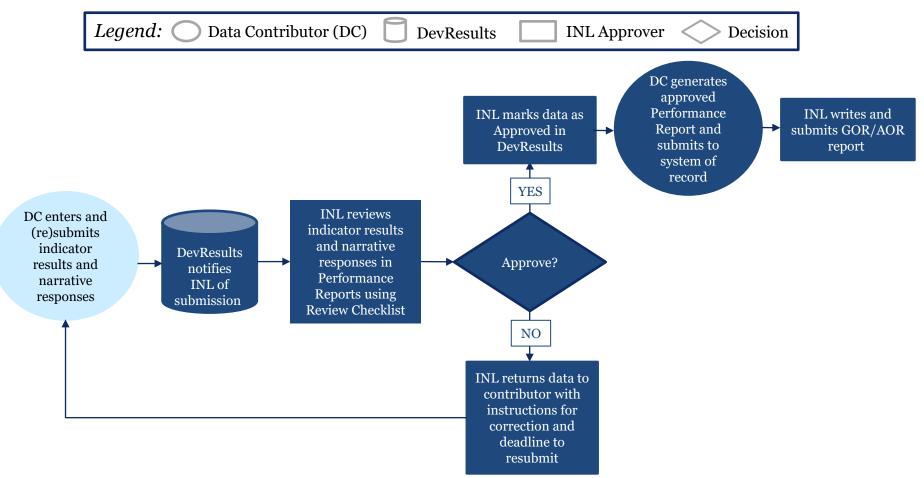
- How the report document is generated:
  - Partner enters data and narratives into DevResults (rather than drafting into a word document)
  - Partner uses the <u>Project Report Tool (PRT)</u> to automatically generate a document version of the report
- Submission and approval:
  - Before generating the report document with the PRT, partner clicks "submit" in DevResults
  - After reviewing the quarterly report, INL program manager clicks "Return" in DevResults if revisions are needed or "Approve" if they are satisfied with the report
- **Location of report information:** With the DevResults reporting system, the report document provides a summary of the indicator data; more detailed indicator information (i.e., dissagregations by gender, location, etc.) can only be found by logging into DevResults

See the <u>next slide</u> for an illustration of this process in full.

If you are unsure who should approve results for your project(s), contact <u>INL-KM-DDL@state.gov</u>.

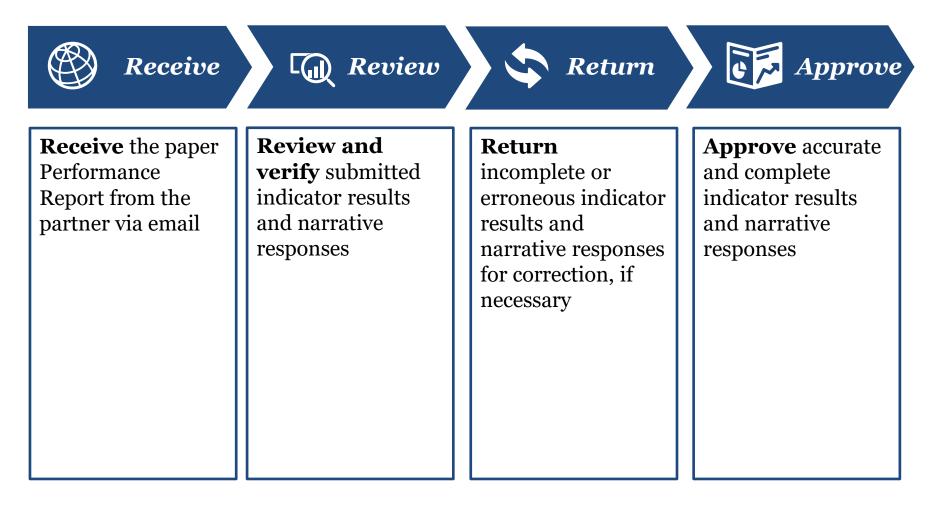
### Process

This document provides a step-by-step guide to approving or requesting changes to data that was submitted in DevResults. This process begins when the Data Contributor (DC), usually the implementing partner, submits indicator results and narrative responses. Designated INL staff then review and approve the data, or send it back to the DC for revision.



## Detailed Process for Data Review and Approval

The process for approving data in the DevResults performance monitoring platform after partner submission of data and the paper performance report can be broken down into four steps. This guide will walk users through the following:





### 1. How to Expect Receipt of the Report

After data contributors have submitted data in DevResults, the designated INL approver will receive an auto-generated DevResults notification email stating that indicator results and narrative responses have been submitted and are ready for review.

The INL approver will also receive a signed and dated Performance Report, in Word format, via email from the partner. This email will also contain any other documents the partner normally submits for a given reporting period.

Example DevResults email notification
From: do-not-reply@devresults.com <do-not-reply@devresults.com> Sent: Thursday, August 11, 2022 1:18 PM To:</do-not-reply@devresults.com>
Subject: Results data submitted for the project 'DEMO Project: K9 Units' External Email
Results data has been <b>submitted</b> for DEMO Project: K9 Units by
Let me know that you've received this, please!

### 2. How to Address Late Submissions

INL approvers may follow these best practices for handling late submissions:

### Late data submission in DevResults:

- Check whether the partner has entered complete data and narratives in DevResults (if you do not know how to check, contact the DevResults POC).
- If data/narratives are incomplete, work with the partner and the DevResults POC to enter this information, and then submit a Performance Report.
- If data/narratives are complete, but the Performance Report has not been submitted, follow the instructions below on paper report submission.

### Late paper report submission to reviewer:

 Contact the partner, provide link to the <u>INL Project Report Tool (PRT)</u> and the <u>Generating</u> <u>the Performance Report guide</u>, and instruct them to contact DevResults POC with any issues or questions



## The Performance Report

The Performance Report is continuously updated to reflect user feedback and provide a comprehensive snapshot of project progress. The report consists of five sections covering project information and data and includes tables to summarize data and graphs to visualize project results.

Please reach out to your DevResults POC to share additional feedback on any report changes you'd like to see.

Performance Report for: DEMO Project: K9 Units Reporting Period: Q 2023 0ct-Dec Generated: 2024-04-04 13:16:43	project's	average completeness f active indicators, 17 (1 active indicators, 0 (0%	00%) are mis	ssing a result valu	e for the	current	planned or ach ed results and/o ed. ove analysis of t	here it is. What has enabled its successes? Where it leving the desired results, why not? Where prior r learning during this reporting period, note that. he project's implementation and results, are there re adjustments to the project that would be	BIND % of concess to 80 work with ment certification DLDDL2.20 20(BIN 2.5, other value of 4 DLDDL2.20 20(BIN 2.5, other va
I. Project Information INL Award Fundametra DEMO_K9_Project	<b>Code</b> 2.02	Indicator Title DEMO U.S. dollar val detected illicit goods DEMO % of EUM insp	ue of per year	Current Curre Result Targ 150,0	et 000	Target Progress	ed. from this period ed.	sanizations you collaborated with during this	
Status: In Progress Primary Implementing Organization Name: INL/KM Implementing Organization Point of Contact: Jane Doe Total Project Backer 5:2500,0000. Country/Countries of Project Implementation: Canada, Venezuela		hat identify a deficie Project Checklist)	ency -	70%			nes from collado t information of ed. ties or external	panzanons you constant area with turing uns aration/meetings: If any. Should include specific collaborators/counterparts if applicable. events for the next reporting period, including any he implementation plan.	e complete before submitting to INL.] native of Primary Implementing Organization: I certify to the best of my
Start Date: 2017-01-01 End Date: 2024-12-31 Il. Project Exciption In countries with the political will to increase investigative leads and uncover illegal goods, canines (K93) represent a highly effective, relatively inexpensive means to increase INL	he parti stablish ertificat r exceed tandard NIST) ca	t Item Name ner government es a rigorous ion process the meets ls National Institute of s and Technology nine standards	2023-06- 30	Comment The partner gov canines to licen veterinarians. 1 government det licensing proces standards.	ised The part termine dures ar	mer d nd	ed. implementation kely they are to ed. s	a that will be monitored over the next reporting occur.	f that this report is correct and complete.
partner detection capacity in <u>a number</u> of key areas. Developing this capacity in most instances seeks to accomplish one or more of the following purposes: - Detecting contraband	nd analy	ountry data collection rsis procedures meet lata quality standards	2024-09- 30	The partner gov started collectin data on the K9 p effectiveness bu report and utiliz completion for	ng incon program ut has ye ze it. Exj	nplete i's et to fully pected	MO U.S.	ogress Comments Western Hemisphere / Canada / CA - Demo Location - K92: This comment was written	
<ul> <li>Deterring illegal transit of illicit goods</li> <li>Identifying investigative leads and evidence of criminal acts</li> </ul>		ndicator data and comm ts.com/en/program/ti					ected illicit MO % of hat identify	first (2:25 <u>pm). Western</u> Hemisphere / Canada / CA - Demo Location - K91: This comment was written second (2:26pm) No response provided.	
Contributing to public safety/ disaster response / <u>counterterrorism</u> III. Report Quality  Mass Assertant Soft		mation its on where the proje discussion of planned							



### **1.** How to Review Indicator Results

To begin review of indicator results in the Performance Report, first:

• Double check that the project name reference number and reporting period are correct

Then, review the indicators displayed in the report:

- The report should include a short list of indicators related to implementation
- If the report does not reflect such a list, or if the list of indicators included are ambiguous or unclear, see <u>Checklist: Reviewing Indicator Results</u> (the next slide) for further

Indicator Code	Indicator Title	Current Result	Current Target	Target Progress
KM.DDL.02.02	DEMO U.S. dollar value of detected illicit goods per year	-	150,000	
KM.DDL.02.03	DEMO % of EUM inspections that identify a deficiency	-	70%	

## 2. Checklist: Reviewing Indicator Results

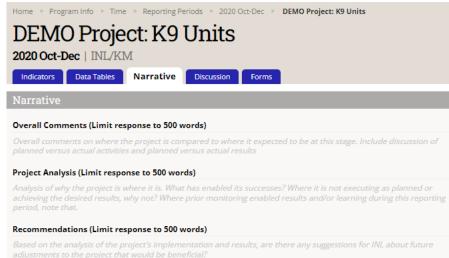
Consider the following items during your review of each indicator:

- 1. Confirm that the data contributor entered results for all indicators assigned to the project. **There should be no blanks in the "Current (Cumulative) Results" column.** If there are blanks, discuss the following with the partner:
  - a) Are data for the indicators not collectible? Are the indicators inappropriate? Are the indicators not useful for monitoring?
  - b) If the answer to these questions is "No", make sure the partner knows they must collect this data and report it.
    - a) If the answer to any of these questions is "Yes", contact your DevResults POC to discuss deleting or modifying the blank indicators.
  - c) Was data entered and submitted for the wrong reporting period?
- 2. Confirm that reported results are appropriate for the project.
  - a) For those projects with targets entered, review the **(Cumulative) Target** and **% (Cumulative) Target Complete** columns and compare with the current results total.
    - i. Flag results that are far above or far below the target.
    - ii. If the result does not have a target, consider working with the partner to add one. Comparing results to targets is the easiest way to know whether or not your project is on track. For information about setting up targets, see <u>here</u>.
  - b) In the case results for formula indicators appear to be inappropriate, check that formulas are computing correctly. If there are still outstanding issues, consult with your DevResults POC.
  - c) In the case results for data table indicators appear to be inappropriate, click into and check the linked data table to confirm that fields are appropriately filled out (shown <u>here</u>). If there are still outstanding issues, consult with your DevResults POC.
- 3. Review any comments left by data contributors in the Performance Report.

## 3. Checklist: Reviewing Narrative Responses

In reviewing Narrative Results, consider the following items during your review of each narrative response:

- 1. Did the data contributor clearly convey what activities were implemented or worked on during the reporting period?
- 2. Did the data contributor clearly articulate what was achieved during the reporting period?
- 3. Did the data contributor describe any difficulties over the course of implementation during the reporting period?
- 4. Do the narrative responses address any unexpected results in the indicator data?
- 5. Do the narrative responses detail any specific actions that will be undertaken to course correct or mitigate any project risks?



#### Success Stories (Limit response to 500 words)

Success stories from this period

#### Partnerships (Limit response to 500 words)

Government offices or other organizations you collaborated with during this period and outcomes from collaboration/meetings, if any. Should include specific names and contact information of collaborators/counterparts if applicable

#### Upcoming Actions (Limit response to 500 words)

Upcoming activities or external events for the next reporting period, including any course corrections or changes to the implementation plan.

#### Risks (Limit response to 500 words)

Risks to project implementation that will be monitored over the next reporting period, and how likely they are to occur.

#### Other Comments (Limit response to 500 words)

Other comments

## **Reviewing Project Milestones**

Milestones/checklists will be displayed on the Performance Report at the very end of the **III. Report Quality** section.

Milestones (from Project Checklist)

	e?	Checklist Item Name	Due Date	Comment
Yes		The partner government establishes a rigorous certification process the meets or exceeds National Institute of Standards and Technology (NIST) canine standards	2023-06- 30	The partner government took canines to licensed veterinarians. The partner government determined licensing procedures and standards.

## 4. Reflect and Prepare to Provide Feedback

As you conclude your review of indicator results and narrative responses, pause to consider larger questions of quality prior to approving or returning submitted data. Ask yourself:

- 1. Over the course of your review, did you understand what the indicators for the project were intended to capture? Did the indicators help you understand the project's progress?
  - a) If the indicators seemed unclear, either in their connection to the project and its objectives or in what they purported to measure, ask the partner for clarification.
  - b) If partners cannot justify the indicator in discussion with you, consider working with the partner to review and redevelop the indicator into one better suited to measuring results for the project.
- 2. Based on your review, would you be able to state the main statistic used to assess whether the project was achieving expected results and/or completing planned activities in that reporting period?
  - a) If yes, the project's indicators are likely well-suited to measuring the project's results.
  - b) If not, work with the data contributor to develop such an indicator.
- 3. Based on your review, were there indicators that were not useful in understanding whether the project is on track? If so, you are encouraged to re-examine whether you and the partner should continue collecting data against these indicators or drop them for future reporting cycles.

Be comprehensive and reflective as you review to allow you to leave constructive feedback for the data contributor.



### 1. Return the Submission for Corrections

If returning the submission to the data contributor for corrections, first:

• Provide feedback by **making comments in the paper report and** emailing it back to the partner with a resubmission deadline.

### Then, return the data submission in DevResults:

• Navigate to the project's reporting period page in DevResults, using the URL in the Performance Report displayed just before the IV. Quarterly Report Narrative section:

For more detailed indicator data and comments, please visit the quarterly report page at https://inl.devresults.com/en/program/time/reportingperiods/awardreportingperiod/84 2267

### **IV. Narrative Information**

### 2. Return the Submission for Corrections (continued)

On the project's reporting period page, **return the submission in DevResults for corrections** by clicking the Status bar to reveal the drop-down selections.

Select the Return data to partner option:

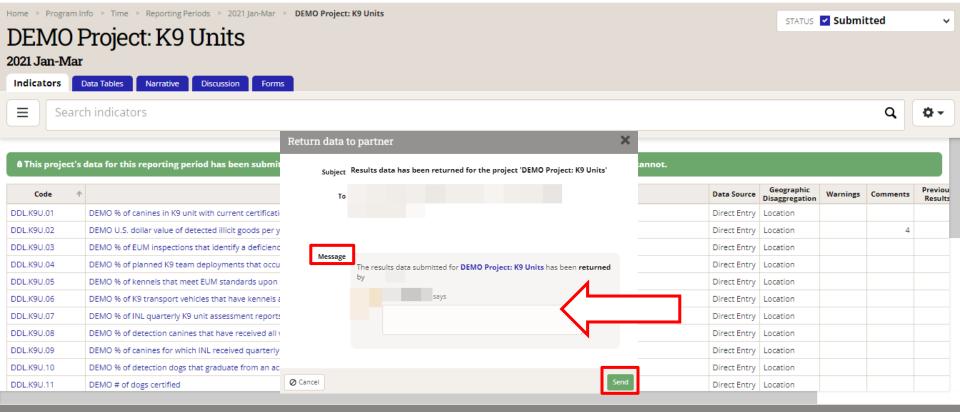
DEMO I 2021 Jan-Mar Indicators	o > Time > Reporting Periods > 2021 Jan-Mar > DEMO Project: K9 Units Project: K9 Units eta Tables Narrative Discussion Forms n indicators				> [		Submitt lata to partn all project d	er	~ •
û This project's	ata for this reporting period has been submitted and is locked. Owners and results approvers can edit the data, but other users cannot.					•			
Code 🔿	Indicator	Data Source	Geographic Disaggregation	Warnings	Comments	Previous Results	Current Results	Target	% Tarı Reach
DDL.K9U.01	DEMO % of canines in K9 unit with current certification	Direct Entry							

DDEROOIDT	being wereanings in the unit of the certain cardin	Directentry	Location			
DDL.K9U.02	DEMO U.S. dollar value of detected illicit goods per year	Direct Entry	Location	4	10,797	
DDL.K9U.03	DEMO % of EUM inspections that identify a deficiency	Direct Entry	Location			
DDL.K9U.04	DEMO % of planned K9 team deployments that occur to the place at the time called for in the operations plan	Direct Entry	Location			
DDL.K9U.05	DEMO % of kennels that meet EUM standards upon inspection	Direct Entry	Location			
DDL.K9U.06	DEMO % of K9 transport vehicles that have kennels and the kennels are climate controlled	Direct Entry	Location			
DDL.K9U.07	DEMO % of INL quarterly K9 unit assessment reports that identify missing equipment listed in the INL standard equipment list	Direct Entry	Location			
DDL.K9U.08	DEMO % of detection canines that have received all vaccinations based on INL's vaccination schedule	Direct Entry	Location			
DDL.K9U.09	DEMO % of canines for which INL received quarterly health reports conducted by a licensed veterinarian	Direct Entry	Location			
DDL.K9U.10	DEMO % of detection dogs that graduate from an accredited canine training facility	Direct Entry	Location			
DDL.K9U.11	DEMO # of dogs certified	Direct Entry	Location			

## 3. Provide Feedback and Resubmission Deadline

Add a message for the data contributor and DevResults POC that provides instructions for revision to data and/or indicators, and include a resubmission deadline in the message box. Click **Send** to return the project's data to the contributor.

Note: Any messages added to the submission will appear, along with their responses, in the **Discussion** tab.



### 4. Data Returned and Unlocked

The project's data will then be returned to the data contributor and unlocked for editing.

Note: The Status bar indicates that the data has been returned to the data contributor and the data is no longer locked.

Home 🔸 Program I	nfo 🔸 Time 🔸 Reporting Periods 🔸 2021 Jan-Mar 🔸 DEMO Project: K9 Units			STATUS 2 Return	he	U
DEMO	Project: K9 Units			SIAIOS E Recuri	eu	
2021 Jan-Mai	-					
Indicators	Data Tables Narrative Discussion Forms					
<b>∃</b> Sear	th indicators				٩	<b>Ø</b> -
KM.DDL.02.01	DEMO % of canines in K9 unit with current certification	Direct Entry	Location			
KM.DDL.02.02	DEMO U.S. dollar value of detected illicit goods per year	Direct Entry	Location			
KM.DDL.02.03	DEMO % of EUM inspections that identify a deficiency	Direct Entry	Location			
KM.DDL.02.04	DEMO % of planned K9 team deployments that occur to the place at the time called for in the operations plan	Direct Entry	Location			
KM.DDL.02.05	DEMO % of kennels that meet EUM standards upon inspection	Direct Entry	Location			
KM.DDL.02.06	DEMO % of K9 transport vehicles that have kennels and the kennels are climate controlled	Direct Entry	Location			
KM.DDL.02.07	DEMO % of INL quarterly K9 unit assessment reports that identify missing equipment listed in the INL standard equipment list	Direct Entry	Location			
KM.DDL.02.08	DEMO % of detection canines that have received all vaccinations based on INL's vaccination schedule	Direct Entry	Location			
KM.DDL.02.09	DEMO % of canines for which INL received quarterly health reports conducted by a licensed veterinarian	Direct Entry	Location			
KM.DDL.02.10	DEMO % of detection dogs that graduate from an accredited canine training facility	Direct Entry	Location			

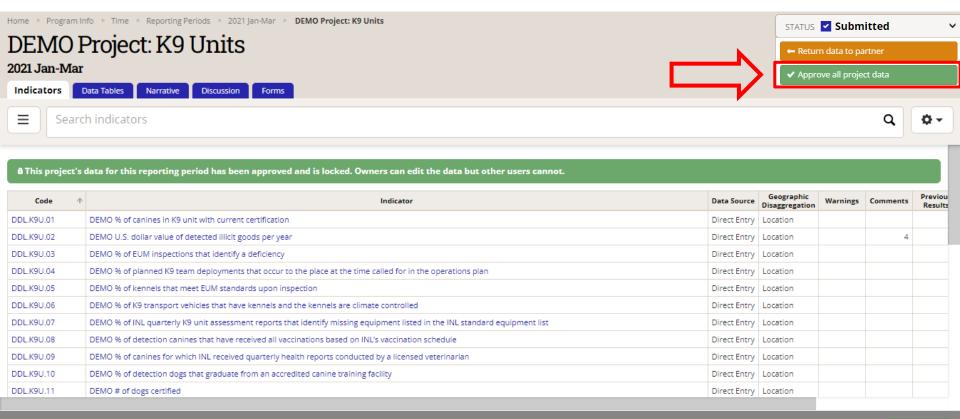


## 1. Approve the Submission

If approving the submission, click the Status bar to reveal the drop-down selections.

### Click Approve all project data.

Note: This step should take place once all comments left from INL during review have been addressed and the data has been determined to be valid.



### 2. Approve the Submission (continued)

Add a message to this project or leave blank and click Send to approve the project's data.

Note: Any messages added to the submission will appear, along with their responses, in the **Discussion** tab.

Home   Program Info  Time  Reporting Periods  2021 Jan-Mar  DEM	Approve a	all pro	oject data	×				STATU	is 🗹 Subr	nitted	~
DEMO Project: K9 Units <sup>2021 Jan-Mar</sup>	Sub	bject R	esults data has been approved for the project 'DEMO Project: K9 Units'								
Indicators Data Tables Narrative Discussion Forms		То									
E Search indicators										۹	<b>Q</b> .
<b>û</b> This project's data for this reporting period has been submitted and	is Mess		The results data submitted for <b>DEMO Project: K9 Units</b> and was <b>approved</b>								
Code 🔿			by		Geographic )isaggregation	Warnings	Comments	Previous Results	Current Results	Target	% Target Reached
DDL.K9U.01 DEMO % of canines in K9 unit with current certification			says		.ocation						096
DDL.K9U.02 DEMO U.S. dollar value of detected illicit goods per year					.ocation		4		10,797		096
DDL.K9U.03 DEMO % of EUM inspections that identify a deficiency					.ocation						096
DDL.K9U.04 DEMO % of planned K9 team deployments that occur to the	ace				.ocation						096
DDL.K9U.05 DEMO % of kennels that meet EUM standards upon inspection	1				.ocation						096
DDL.K9U.06 DEMO % of K9 transport vehicles that have kennels and the k					.ocation						096
DDL.K9U.07 DEMO % of INL quarterly K9 unit assessment reports that ide	tify 🖉 Cancel			Send	.ocation						096
DDL.K9U.08 DEMO % of detection canines that have received all vaccination	ns based on INL's vac	ccination	schedule Direct	ct Entry	Location						096

### 3. Data Approved

DEMO % of detection canines that have received all vaccinations based on INL's vaccination schedule

DDL.K9U.08

This project's data is now approved! This is indicated by the updated Status bar.

Home * Program Info * Time * Reporting Periods * 2021 Jan-Mar * DEMO Project: K9 Units DEMO Project: K9 Units									roved	~	
2021 Jan-M											
Indicators	D	ata Tables Narrative Discussion Forms									
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û This proje	ct's o	ata for this reporting period has been approved and is locked. Owners can edit the data but other users cannot.									
Code	ŕ	Indicator	Data Source	Geographic Disaggregation	Warnings	Comments	Previous Results	Current Results	Target	% Target Reached	
DDL.K9U.01		DEMO % of canines in K9 unit with current certification	Direct Entry	Location						096	
DDL.K9U.02		DEMO U.S. dollar value of detected illicit goods per year	Direct Entry	Location		4		10,797		096	
DDL.K9U.03		DEMO % of EUM inspections that identify a deficiency	Direct Entry	Location						096	
DDL.K9U.04		DEMO % of planned K9 team deployments that occur to the place at the time called for in the operations plan	Direct Entry	Location						096	
DDL.K9U.05		DEMO % of kennels that meet EUM standards upon inspection	Direct Entry	Location						096	
DDL.K9U.06		DEMO % of K9 transport vehicles that have kennels and the kennels are climate controlled	Direct Entry	Location						096	
		DEMO % of INL quarterly K9 unit assessment reports that identify missing equipment listed in the INL standard equipment list	Direct Entry	Location							
DDL.K9U.07		Demo worne quarteny to une assessment reports that identify missing equipment instea in the net standard equipment ist	Directentry	Location						096	

Direct Entry Location

096

### 4. Generate a New Performance Report

Once the data is approved, a new performance report needs to be generated with **Status: Approved** and then submitted per the instructions in the implementing agreement. Refer the partner to the <u>Generating the Performance Report Guide</u> again if needed.

> Performance Report for: DEMO Project: K9 Units Reporting Period: Q 2021 Jan-Mar Generated: 2024-02-08 22:29:51

I. Project Information



INL Award Number: DEMO\_K9\_Project

Status: Approved INL Program Manager: Primary Implementing Organization Name: INL/KM Implementing Organization Point of Contact: Total Project Budget: \$2,500,000.00 Country/Countries of Project Implementation: Canada, Venezuela Start Date: 2017-01-01 End Date: 2024-12-31

### Submission Approved: Now What?

Once you have approved the submitted results, you may proceed to **Request a GOR/AOR Automated Performance Report,** if applicable, via <u>this link</u>.

· · · · · · · · · · · · · · · · · · ·	
International Narcotics and Law Enforcement U.S. DEPARTMENT of STATE	
DevResults Project Report	
Generator	
Download a document summarizing your DevResults project information.	
Report Type	
Performance Report	
Project	Filter Projects By:
Select 🗸	O     All Projects My Bookmarked Projects
Reporting period	
Select ~	INL Program Team
Name of INL program manager	Select 🗸
	Project Status
Name of implementing partner point of contact	Active 🗸
Generate Report	
Reset	

**Note:** The same link is used for partners to request a Performance Report, and for INL to request a GOR/AOR report. Please select the report type under "Report Type."

# **DevResults Support**

## **DevResults Support**

If you have questions on project details or general DevResults questions, contact the DevResults Help Desk for assistance by clicking **Help** at the top right of your screen and click **Contact Helpdesk** (see below). Your help request will be assigned to the appropriate team at DevResults or INL depending on the nature of your question.

You can also access user guides and additional help materials by navigating to the INL User Guide (<u>here</u>).

U.S. Department of State INL Monitoring Database	Quick search Q 🥑 Help
Data     Program Info     Tools     Administration     Bookmarks       System Default     + Add a dashboard	<ul> <li>MultiMatrix Basics for Partners</li> <li>Update Administrative Divisions</li> <li>Video Tutorial: Dashboards</li> <li>Dashboards</li> <li>Dashboards</li> <li>Dashboards</li> <li>Dashboards</li> </ul>
Activity Map	Welcome to De Visualizations: Pie Chart  Visualizations: Targets and Actuals Graph  Search knowledge base
	Velcome to your DevRes       Image: Contact Helpdesk         Fyou're new to DevResults, please here       Image: My User Guide         o get started.       Image: My User Guide         ooking for specific instructions? We h       What's New?         main and the specific instructions? We h       What's New?         Image: My User Guide       Image: My User Guide         Image: My User Guide       Image: My User Guide     <
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🕕 DevResults