REPORTING

Reporting is an important part of most monitoring and evaluation (M&E) systems. Reports should present information to different stakeholders in ways that make it easy for them to use. Within CSOs, internal M&E reports are usually designed to support project or programme management. External reports, on the other hand, are largely designed to demonstrate accountability, raise funds or promote wider learning.

CSOs produce reports all the time. These include logistics reports, financial reports, administrative reports, informal briefs, research studies, fundraising reports, event reports, human resources reports, press releases, newsletters and glossy annual reports, to name just a few. Reports are developed for many different purposes at different levels of a CSO.

Reporting is an important part of most monitoring and evaluation (M&E) systems. It is important because it often provides the link between data collection and analysis on the one hand, and data use on the other. Reports should present information to different stakeholders in ways that make it easy for them to use. Written reporting is not the only way of presenting information. Other ways include audio-visual materials, interactive media, verbal presentations, dance and theatre. But within CSOs written reporting is by far the most common way of presenting M&E information.

Reporting is not a purpose in itself, although it is sometimes described as one. Instead, it is a means to achieve other purposes. These include providing information to enable project or programme management; disseminating learning; demonstrating accountability to different stakeholders; recording conclusions and recommendations so they can be tracked and monitored; communicating information more widely for marketing or fundraising work; providing evidence for policy influencing work; and many other different purposes.

M&E reports can be produced at any stage of a project or programme cycle from baselines through to impact assessment. M&E reports can be roughly divided into two groups. Reports for internal audiences are usually designed to support project or programme management. External reports, on the other hand, are produced for stakeholders outside of project or programme teams, and are largely designed to demonstrate accountability, raise funds or promote wider learning.

CSOs often have to produce multiple different reports throughout a project or programme. Therefore, M&E teams commonly develop reporting plans or schedules that indicate which reports need to be produced, when and why. A simple reporting plan is shown in the box below.

Project and programme reports

Progress reports are usually required from projects and programmes on a regular basis. They can be produced weekly, monthly, quarterly, bi-annually or annually. Weekly or monthly reports are mainly used to describe activities and finances against plans and budgets. Quarterly, biannual and annual reports are often more analytical, and are typically based around descriptions of progress (together with supporting evidence), achievements, failures, lessons learned and recommendations for future work.

Progress reports are frequently the most important kind of report developed within an M&E system. This is because the contents are used extensively both for internal management and as source material for a variety of external reports. The box on the following page shows some of the common topics covered by a project or programme progress report.

A Typical Reporting Schedule

Name of report	Person / team responsible	Contents	Key stakeholders	Templates	Frequency	Dissemination	Dates
Baseline report	M&E team	Analysis of baseline results	M&E and evaluation teams	N/A	Once only, at start of the project	Internal team only	December 2019
Project reports	Project managers	Description of activities and budgets	Internal management	Monthly project report template	Monthly	Project senior managers and other teams	The first Friday in each month
Annual reports	Project and programme managers	Changes and lessons learned	Donors, Board and internal management	Annual report template	Annually	Internal staff, Board, donors, supporters	30th of November each year

Typical Contents of a Project or Programme Progress Report

Project / programme header information: The name of the project / programme, the start and end dates, project or programme codes, etc.

Summary: A summary of the project or programme, including a brief description of the project or programme, including the main priority area(s), geographic focus and target groups, and a brief mention of any partners that have contributed towards the project or programme, and how. The summary could also include any key accomplishments, challenges or lessons learned to-date.

Changes in the internal and external operating context: Any significant changes in the internal and external environment that have affected the project or programme over the past period, and an indication of how those changes are likely to affect the project or programme in the future. This section could also include any recommended actions for dealing with the changes

Activities: Major activities carried out over the previous period, a note on any divergence from existing plans and budgets, and a description of how plans and budgets have changed or might change.

Progress against objectives: A description of progress against the objectives and/or indicators defined in the project or programme plan. This should include statements on progress, supported by evidence. Where necessary, it should also include an analysis of how the project or programme contributed to change, along with the contribution of other relevant factors.

Other progress: Any other major changes, positive or negative, planned or unplanned, resulting from the project or programme to date. As above, this should also be supplemented by evidence.

Analysis: An analysis of any changes, outlining their significance and likely sustainability. This could also include a description of what needs to change based on progress made to date.

Lessons learned: Identification of key lessons learned to date that might be useful for the project or programme in the future or for wider stakeholders. These might be lessons spontaneously arising out of project or programme work, or the result of dedicated work to answer defined learning questions.

Risks and assumptions: A report against any predicted risks and assumptions, together with any actions taken to mitigate them. This section could also cover any unforeseen problems that have arisen, and an explanation of how they have been dealt with (if at all).

Project or programme processes: A description of key internal project or programme processes that have affected the work carried out. This could include many kinds of factors from logistics, equipment and personnel through to compliance and contracts.

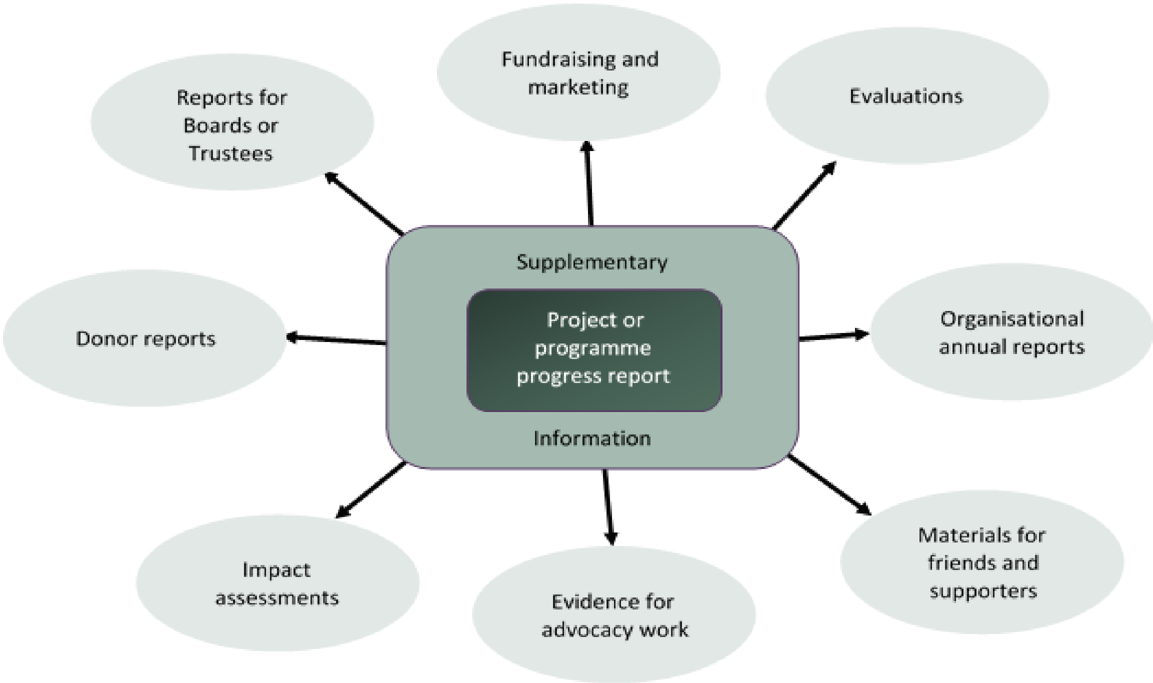
Specific issues: Any issues of special interest to the project or programme, such as the participation of different groups, gender relations, issues around capacity development, relations with partners, beneficiary feedback or complaints, etc.

Conclusions and recommendations: Based on the previous sections, an outline of any suggested changes to plans or budgets, and an outline of any recommendations for the future. Recommendations might apply only to the particular project or programme, but might also apply to wider work.

M&E: An update on the project/programme's key planning, monitoring, evaluation and reporting activities to-date, together with recommendations for change.

Possible annexes:

- updates on a logical framework, indicator tracking table or M&E plan
- photographs, media reports or videos
- attached reports, case studies or stories of change
- transcripts of interviews or results of surveys



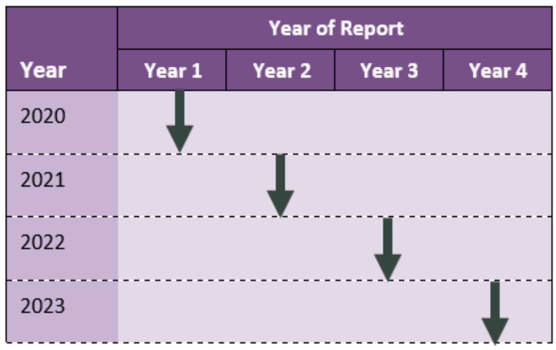
If a project or programme progress report is done well it can serve many functions. The diagram above shows how a good project or programme progress report, when supplemented by additional information, can meet the needs of many audiences such as fundraisers, campaigners, boards, trustees, donors, evaluators, people carrying out advocacy work, friends and supporters, as well as project and programme staff and management. Conversely, if the reports are not done well then each stakeholder is likely to end up asking for individual reports that serve their own needs. This can then lead to a situation in which project or programme field staff are constantly inundated with demands for more and more information.

Periodic reporting

Sometimes it is obvious what a report should cover. But sometimes it is unclear. In INTRAC's experience project or programme staff are often confused between reporting on activities carried out during a period, and changes that have been ***identified*** during a period, but may or may not be the result of activities carried out during that period. This is most likely to cause confusion when regular project or programme reports are designed to report against timebound objectives and indicators defined in project or programme plans or logical frameworks. There are two basic scenarios.

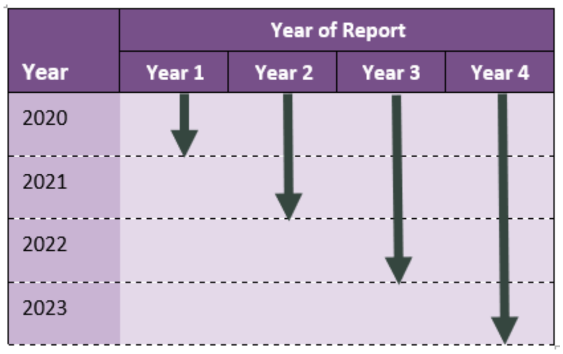
In the first scenario (see diagram labelled activity reporting) an annual report might cover a project or programme's activities or outputs. Reporting is straightforward as activities and outputs are usually confined to an individual year and can be identified as soon as they occur. The first annual report covers activities carried out (or outputs delivered) in the first year, the second covers activities carried out in the second year, and so on.

Activity Reporting



In the second scenario (see diagram below), an annual report might cover changes brought about through a project or programme. These changes are normally cumulative. This means a change that happens in the first year of a project will still exist in year two (although it may have been strengthened or deepened). However, changes seen in year two may or may not have been the result of activities carried out in year two. They may have been the result of activities carried out in year one, or a combination of activities carried out in years one and two.

Change reporting



The confusion arises when staff try to carry out both kinds of reporting at the same time. They describe the activities carried out in a period (such as a month, quarter or year) and also try to report the changes resulting from work carried out in that period. This causes difficulties because the results of many kinds of activities (e.g. capacity development or policy influencing work) may not be identified until long after the activity has taken place.

The solution is relatively straightforward. It is to record changes as they are identified, and explain clearly how those changes came about. And if a change has been described in year one of a project and is sustained into year two then it is reasonable to describe it again in the second year's report.

A further problem occurs when project or programme staff find out that changes have happened wholly or partly because of work carried out many years ago – often before the current project or programme plan was developed, and possibly supported by a different donor. Again, the answer is to report clearly on the change, and what contributed to that change. This is a particular challenge in complex projects and programmes that may extend across long periods and many different phases.

Transmission of reports

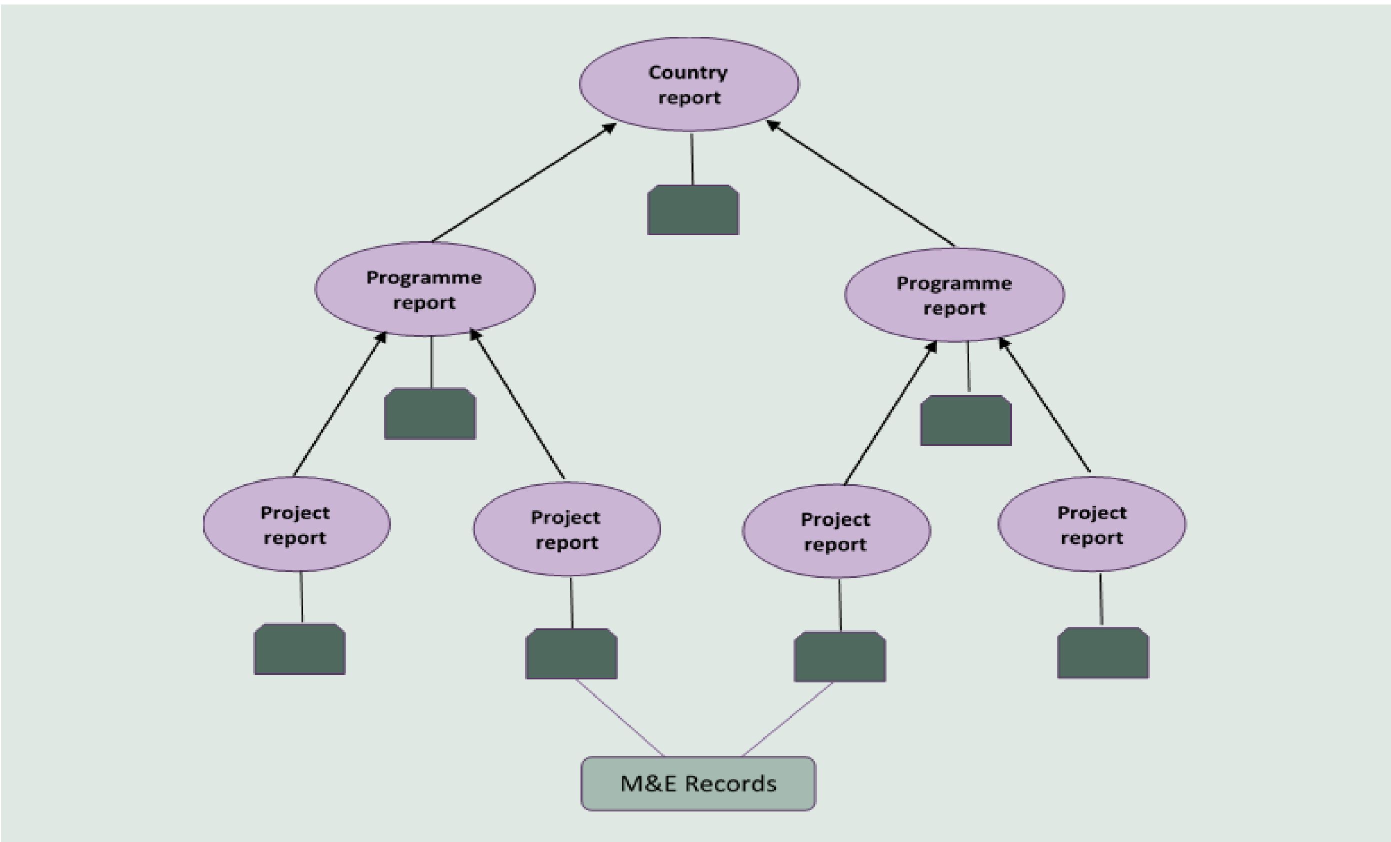
In large NGOs, reports are commonly developed at many different levels. They are then passed up to a higher level, where they are reduced and summarised. For example, a programme may develop a quarterly report based on several project reports. A country office may then produce a quarterly report based on several programme reports. And a regional or global report may be based on several country reports. This is illustrated in the diagram below.

Project reports (at the bottom of the diagram) are typically based on M&E records kept within the project, and may also draw on the informal observations and experiences of project staff and beneficiaries. Programme reports are then produced based on these project reports. But they might also draw on M&E records held at programme level, as well as the informal observations and experiences of programme staff. A country report may then draw on many programme reports, as well as M&E records generated through country-level M&E processes. And so on.

This is essentially how many large NGOs generate reports. In the largest International NGOs (INGOs) there may be thousands of projects in multiple country programmes based in different regions eventually contributing to a single global report. As information travels up the hierarchy it becomes increasingly summarised.

Eventually, global, regional or country reports may be converted into several different reports for stakeholders such as partners, boards, senior managers, donors, host governments etc. This network of reports across entire NGOs is always more valuable when basic project and programme reporting is done well.

The Transmission of Reports Across NGOs



Some Do's and Don'ts of Reporting

Do…	Don't…
• Be clear about who the audience for your report is, and fit the message, content, format and timing to suit that audience. • Make sure that reports are as accurate as possible. Trust is easily lost if you over claim or ignore errors or mistakes. • Ensure that reports are written in concise, clear language. • Make sure that your report is well-structured and has a logical flow. • Make sure that any changes you report are backed up with evidence, and with a clear description of how your project or programme contributed to the change(s). • Translate your report into local languages if you want it to be more widely read. • Make sure that anyone submitting a report receives feedback – nothing is more demoralising than writing a report and never getting any response. • Ensure your report is presented nicely, and contains suitable charts and pictures if appropriate.	• Expect people to write perfect reports in their second, third or fourth language. • Write too much. • Get obsessed with reporting about activities and forget the changes that have occured as a result. People are usually more interested in change than long lists of activities. • Forget about negative as well as positive changes. • Assume that your audience will automatically know acronyms or jargon that your project or programme uses all the time. • Write your report at the last minute, as this will cut down on the possibility for reflection and analysis. • Assume you have to be certain about a change before reporting it. • Assume that everybody will read the report – many people prefer other means of communication. • Forget to put your report through a grammar and spell check before finalising it.

Further reading and resources

Another paper in this section of the M&E Universe deals with the reporting of changes arising out of a project or programme. The paper on evaluation contains some brief comments on reports generated through evaluations. This papers can be accessed by clicking on the links below.

Reporting change

Evaluation

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INTRAC is a not-for-profit organisation that builds the skills and knowledge of civil society organisations to be more effective in addressing poverty and inequality. Since 1992 INTRAC has provided specialist support in monitoring and evaluation, working with people to develop their own M&E approaches and tools, based on their needs. We encourage appropriate and practical M&E, based on understanding what works in different contexts.

M&E Universe

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