



Write M&E Reports

PP3-10A

Session Goals – Will learn about:

- Reporting & why it is important
 - The different types of reports & communication tools that are usually produced by organizations
 - Formats for quarterly & final project reports
 - Developing a reporting programme & schedule.
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Reporting to Your Internal & External Audiences

- There is not much point to collecting & monitoring evaluation data unless you know how & by whom that data will be used.
 - Your challenge is to turn raw data information into useful knowledge & then report your results to the different programme audiences (*e.g.*, donors, board members) in a way that will be useful both to them & your organization.
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What is Reporting?

- A report is a compilation of descriptive information.
- A report is a communication tool to present M&E results by presenting raw data & information as knowledge.
- A report is an opportunity for project implementers to inform themselves & others (stakeholders, partners, donors, etc.) on the progress, problems, difficulties encountered, successes & lessons learned during implementation of programs & activities.

Why is Reporting Essential?

- Reporting enables the assessment of progress & achievements & helps focus audiences on the results of activities, enabling the improvement of subsequent work plans.
 - Reporting helps form the basis for decision-making & learning at the programme level.
 - Reporting communicates how effectively & efficiently an NGO is meeting its objectives.
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Elements of a Good Report

A good report:

- • Focuses on results & accomplishments
 - • Assesses performance over the past reporting period, using established indicators, schedules, baselines & targets
 - • States explicitly whether & how much progress or results surpassed, met, or fell short of expectations & why
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... Elements of a Good Report

- Specifies actions to overcome problems & accelerate performance, where necessary
 - • Explains the influence of comparative performance by objectives on the resource request
 - • Addresses issues related to PLHWAs, including the issues of specific gender & other vulnerable groups, in the analysis of program performance
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... Elements of a Good Report

- Identifies the need to adjust resource allocations, indicators, or targets, where necessary
- • Discusses the way forward & the prospects for successful programme closeout or graduation & addresses aspects of sustainability of results

Specific types of communication tools include:

- Oral presentations
 - Discussion sessions
 - Informal contacts
 - Written progress reports/updates
 - Written performance/evaluation reports
 - Press & media releases
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...Specific types of communication tools include:

- Formal academic papers & books
 - Visual presentations
 - Internet, e-mail & websites
 - Play, music & dances
 - Brochures & pamphlets
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Types of Communication Tools Often Required by Donors

Three types of communication are often required by donors (in addition to regular financial information):

- 1. Written progress reports (quarterly)
 - 2. Internal mid-term evaluations
 - 3. Participatory final evaluations
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Generic Outline for Quarterly Progress Reports

- Quarterly progress reports are the most common & most important format an organization has for conveying information about a project to its donor.
 - Progress reports should focus on presenting in a concise format the advances (or lack thereof) made on a project during a specific quarter.
 - Quarterly reports are often laid out in the following manner:
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I. INTRODUCTION

Brief one to two paragraph introduction:

- **Concise presentation of the objectives of the project,**
 - **The need for this report and**
 - **What the report includes).**
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II. COMPARISON OF PLANNED VERSUS ACTUAL EVENTS:

- **Brief narrative comparing planned activities & budget to actual activities undertaken & budget spent during the quarter.**
 - **The basis of this narrative is what you had planned & how you are responding (tells the donor why something that was planned did not take place & what you plan to do about it); and/or the facilitating factors that helped you achieve activities faster than expected (tells the donor if you are ahead of schedule & why).**
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III. ADMINISTRATIVE REVIEW:

- Discuss the status of your administration of the programme.
 - During the reporting period, were there any changes in staffing, organizational development issues (new systems, failing systems, etc.), managerial issues, or results on special awards conditions (if applicable)?
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IV. FINANCIAL REVIEW/EXPENDITURE REPORT/COST SHARE REPORT:

- **Provide a brief management review of the organization's financial status (compare what the organization planned to spend to what the organization actually spent).**
- **Do you need a budget realignment?**
- **Will rescheduling of activities affect the budget?
How are the cost-share components functioning?**
- **Are these on track with expectations?**
- **Explain any very low or very high expenditure rates.**

V. INDICATOR DATA & MER DATABASES:

- Discuss your progress in collecting & storing project indicator data.
- When you have new data, report the baseline figures & provide a brief analysis of the new information.
- Provide updated protocols if changes occurred.

VI. NOTABLE LESSONS, INNOVATIONS, OR QUOTES:

- **Briefly capture any lessons learned during the recording period, interesting anecdotes suggesting programme impacts, or small success stories.**
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VII. ISSUES REQUIRING IMMEDIATE SUPPORT/ATTENTION BY THE DONOR:

- **In bullet form note any issues requiring the immediate assistance or attention of donor personnel in support of your project.**
 - **(This is a concise list of items that may be mentioned otherwise in the report.)**
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Example

- **Project budget re-alignment is requested to account for change in workshops venue.**
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ANNEXES

- **ANNEX 1. BENCHMARK CALENDAR:** An updated Benchmark Calendar. This should be re-worked each quarter to reflect your progress or lack thereof during the recording period.
 - **ANNEX 2. STATUS OF DELIVERABLES:** An updated Deliverables Schedule. This should be re-worked each quarter to reflect your progress or lack thereof during the recording period.
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