

PREPARING REPORTS FOR AID AGENCIES: TEN BASIC PRINCIPLES

In reporting to government and aid agency donors, the main job is to demonstrate that the organization has made good use of the funding that was received and in accordance with the conditions under what it was given. Here are a few elementary suggestions that will help ensure acceptance of your report.

- 1. First and foremost, get the report in on time.** This seems obvious, but it is astonishing how many reports are submitted late. If this is the case, you have already lost credibility, and your job is that much harder to convince the donor that yours is a serious and professional organization that has made good use of the donor's money.
- 2. Write with your reader in mind.** Think of the person whose job it is to evaluate your report. He or she is busy, and will be frustrated if they have to spend time trying to figure out what really happened. They want to understand, with as little effort as possible, what was accomplished with respect to the project's original objectives.

Ask yourself:

- What does my reader know about all this?
- What assumptions can I make or not make?

Know what your reader is expecting. Go back and re-read the original proposal and the contract or acceptance letter - this is the basis upon which the funds were given.

A couple of tips:

- Avoid jargon, especially your own organization's jargon.
- Avoid acronyms unless they really make the text easier to understand. If you do use acronyms or abbreviations, include a list of them where the reader can easily find it.

3. Speak their language.

- Use the title of the project as the agency has defined it in their letter of agreement.
- If the donor has assigned a number to the grant or the project, put this on the title page.
- Check out the lingo that this particular agency uses in their version of the logical framework, and speak it back to them.

- 4. Make your report clear, concise, and well-organized.** This is obviously the golden rule of report writing. If in addition to having good conservation and development results, your report is clear and concise, you can be pretty certain that the donor will be satisfied, perhaps even enthusiastic.

Structure the report around the objectives of the project, using a simple format. For an interim report, a good structure would be something like:

- Title page
- Executive summary (approximately one page)
- Table of Contents
- Introduction (short)
- Objectives during the period under review
- Progress towards Objectives (main section of report)

- Conclusion (short)
- Objectives and work plan for next reporting period
- List of available reports produced during the period under review
- Financial report, with justification of budget line variances as necessary
- Budget and cash flow projection for the next reporting period, with justifications as necessary.

Interim reports should be kept short (main body of the text about six pages), and should avoid lengthy annexes.

Final reports should give a complete picture, and should include, in addition to the above, critical appreciation and a section on lessons learned. This could also be an occasion to discuss new approaches or policy developments that the agency might want to implement in its own work. Annexes are fine in a final report, and will normally include the publications produced, and summaries of the reports of the midterm and final evaluations.

- 5. Reduce and synthesize the information provided.** Concentrate on information of technical interest, but avoid unnecessary or uninteresting details. Only important information should be included. The reader does not want to be overloaded with details. Any detail that does not strengthen the case of the accomplishment of the objectives should probably be omitted.
- Ask yourself: Does my reader really want to know this?

- 6. Focus on progress towards objectives.** A long section on the environmental interest of the site or the issue tells the donor nothing about whether their investment has produced good results. If this is inserted in the body of the report, the reader may ever get irritated, thinking that you are trying to camouflage a lack of results. The full description of the environmental scene will have been included in the proposal or the description of the project attached to the contract. Brief reference can be made to this, rather than repeating the description at the beginning of every report.

Be aware of the difference among activities, outputs, and strategic results. As an example, lists of meetings and missions are probably not of great interest to the donor. The donor's objective is not to finance meetings or trips; however, most will happily pay for the objectives that are accomplished by those activities. Instead of listing meetings, discuss what input was given, how it was received, or what policy advances were achieved. If appropriate, include documents prepared for the meetings in the annexes or list of reports.

- 7. Formulate work plans according to objectives.** As in the logical framework methodology, all of the activities together should be sufficient to achieve the objective, and equally important, they should all be necessary as well. More rigorous objectives-oriented planning of your programme or project will make report writing afterwards substantially easier.
- 8. Talk only about what happened during the reporting period.** If you are writing the report some months after the reporting period has ended, resist the temptation to include more recent developments. The donor is expecting to know what was accomplished, and what funds were expended, during this particular timeframe.

It may be appropriate to give an idea of developments you expect to be important during the next reporting period, but save the actual information for the next report. If the reviewer reads the same story two reporting periods in a row, they will undoubtedly ask questions about the real progress the project is making.

- 9. Be up front about problems, delays, and failures.** Virtually all projects have problems. These should be discussed openly, explaining the reasons, but without making excuses. Make sure the donor understands how you are trying to resolve any problems that have arisen.

Remember, failures usually provide greater opportunities for learning than do successes.

10. Ensure that your report is of a high professional standard.

- Consistency is important. Check that spelling and abbreviations are consistent.
- Use your organization's Style Guide.
- If you need to use bibliographic references, make sure that all references cited in the text are included in the list of references, and that every reference in the list is indeed cited in the text. Make sure that all your references are complete, so the reader knows where to find it if he or she is interested.
- If you are including appendices, list these in the Table of Contents.
- If possible, avoid numbering sub-sections and sub-sub-sections. This can make the text unpleasantly heavy.
- Ensure that the organization and the visual presentation of the report facilitate the reader's quick comprehension.
- Always include a good one-page executive summary. This should be prepared with a great deal of care, as it may be the only part of the report that is read.

To experienced report writers, these suggestions are obvious.

However, donors, including government aid agencies, are becoming increasingly demanding, which means that recipient organizations need to redouble their efforts to produce quality reports, or they risk losing both funds and credibility - not only for individual projects, but for the organization as a whole.

A final word of advice. The quality of reporting is often very closely linked with the quality of planning, self-evaluation, and monitoring during the reporting period. If you and your staff can make quarterly or monthly work plans focused on objectives, and then keep track of your progress on a quarterly or monthly basis, when it comes time to write the report you will find that the job is almost done already. If you keep track of your work and your accomplishments (both small and large) on a fairly frequent basis, you will be amazed at the number of things you have achieved, and you will be in a good position to prepare a strong report relatively painlessly.