

Preparing Reports

Module



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OPERATIONS FACT SHEET

MYANMAR: Cyclone Nargis 2008

Background:
The worst cyclone to hit Myanmar in decades, Cyclone Nargis, occurred on 2nd and 3rd May 2008, devastating 115 villages in the divisions of Ayeyarwady and Kangoon. Much of the loss of life and damage was caused by a consequent storm surge (reportedly 3.5 metres in many areas and 7 metres in parts). On hot land this phenomenon can be devastating. While technology allows cyclones to be 'seen' in terms of wind speed and rain potential, storm surges are much more difficult to predict. According to official figures, 84,500 people were killed and 53,800 are still listed as missing. The UN estimates that 2.4 million people were affected.

Irish Red Cross response:

Emergency relief phase: The Irish public responded generously to the Irish Red Cross Cyclone Nargis Appeal. This enabled us to immediately respond to the huge needs of the affected populations by contributing to the combined co-ordinated efforts of the International Red Cross Red Crescent Movement. In this way, for emergency relief goods and emergency shelter for those whose homes had been damaged or destroyed. Additionally, an experienced Irish Red Cross Delegate, Joe Lavery, was mobilised to support the emergency relief operation on the ground.

Recovery phase: Once the most immediate needs of those affected by the cyclone are met, it is also vital to ensure that longer-term projects are undertaken to rebuild communities and infrastructure destroyed. In the aftermath of Cyclone Nargis, there was an urgent need to ensure access to clean drinking water and safe sanitation. The Irish Red Cross responded to these needs by providing support to the International Committee of the Red Cross (ICRC) to build the capacity of the Myanmar Red Cross Society Branch network. This included training in the construction, operation and maintenance of cement water tanks in disaster prone areas.



Irish Red Cross Delegate, Joe Lavery, arrived in Myanmar in the days following Cyclone Nargis to assist in the IRC emergency operation.

| | |
|---|--|
| Amount contributed by IRCS to this appeal: | €480,000 |
| Dates of IRCS involvement: | May – August 2008 |
| IRCS personnel: | 1 Irish Red Cross Delegate was seconded to the Myanmar emergency operation. |
| Sectors supported by IRCS: | <ul style="list-style-type: none"> • Emergency relief goods • Emergency shelter • Water and sanitation • Capacity building |

Contents

Overview 3

How to Use the Module? 3

1. The purpose of report writing..... 4

 Introduction4

 Discussions with Community workers7

 The ‘narrative’ and ‘progress’ approaches to reports.....8

 Monitoring and Evaluation8

2. Different kinds of reports10

 Some common kinds of organization and project reports 10

 Incident reports 10

 Regular (e.g. monthly) reports..... 10

 Activity Reports..... 11

 Workshop or training report 11

 Meeting or conference reports 12

 Travel reports..... 12

 Field trip report..... 12

 Example 13

 General Reports..... 15

 Examples of reports using the narrative and progress approaches..... 16

3. Different reporting formats19

 What is a reporting format? 19

 Interim Report.....22

 A Note on Evaluation:25

 Summarising chapter 3...26

 General Reports.....27

4. Writing Better General Reports28

 Identify the likely reader or audience28

 Narrative approach or progress approach?.....28

 Choosing an appropriate structure (or format) for the general report.29

 What makes a better report?30

Self-testing activities answers33

Overview

Preparing Reports will help you to acquire the knowledge and skills you need to understand how to go about preparing different kinds of reports for community organisations and community projects. It will focus specifically on helping you to understand the purpose of reports and the narrative and progress approaches to reporting so that you will be aware of getting the right combination of these two approaches in a particular report.

How to Use the Module?

A **module is a package of learning materials**. This module is arranged as a series of "**chapters**", i.e. like chapters of a book. In each chapter, you will find:

- Learning content for you to study
- Self testing activities with answers provided

*You are advised to have a look on five additional documents, as **examples of reports**, in EPRP website in 'Preparing Reports' [section](#):*

- *3 examples of Activity Report*
- *1 example of Interim Report*
- *1 example of Final Report*

1. The purpose of report writing

Introduction

Different people working with community organisations and working on community projects need many different skills. These skills can be acquired in many ways --- doing a training course, attending a workshop, learning from others, learning from experience. Everyone has their own 'ways to learn'. Everyone has their own most difficult topics'. For some people it may be finance and budgets that they hate and for others it may be formal planning processes. The one skill that seems to give **everybody** working in community organisations and community projects headaches is 'report-writing'. Therefore in many organisations and projects, it's a responsibility that everybody tries to avoid, and everybody may try to forget.

Why haven't you got it? Probably because other staff or members of your team have not provided you with the reports they were supposed to provide. Because they also hate writing reports, or can't see the need for them, or think they don't know how to write them.

The purpose of this introduction is not to tell you that report-writing is easy. It is not. But you can learn to understand the importance of reports, and you can learn to make report-writing easier. The secret is that you cannot write a report without the necessary information. Often, the problem of report-writing is not so much the writing, but having or getting the information that you need.



That means that to solve your report-writing problems, you have to be willing to solve other people's report-writing problems. You need a reporting system.

This module is therefore not just about the 'writing' of reports, but about building a reporting system that fits your organization and your activities. It's about recognizing what various reports are for, who needs them and thinking about how to make sure that the people you need to get reports from are able to provide the reports that you need so that you can write the report that you are responsible for.

What this means is that you or somebody in your organization needs to spend some time putting together a system and making sure that everybody knows how to use it.

This is not something that can be done once by one person and it is finished. Systems need regular maintenance and occasional repairs and renovations...by the team.

Probably once or twice a year, your team needs to sit together to review its reporting systems. If you invest in one-day workshops about report writing and reporting systems, you will find that your system develops

towards 'matching' the reporting requirements and the ability of those required to write them. Both may change over time, reports formats can be kept very simple because those required to write them are lacking in skill. They may become more 'sophisticated' as those required to write the

reports become more skilled and experienced. Of course, you may have to include in this discussion, those who are demanding reports from you. You cannot be expected to provide an adequate report, if you cannot understand the reporting format that you have been instructed to use (but have not been trained to use). This module starts with the why of reports and moves to the how. The connecting link between these is the reporting system. Again, if you have reporting problems, you may find it is not enough to learn to write reports, you may have to mobilize others around you to participate in building or renovating the reporting system.

One more short introductory note...

A report is a story. But when you complain about not knowing how to write a report, it is not because you are unable to tell a good story. The kind of report-writing we are talking about here is organizational and project reporting. This kind of reporting usually involves two distinct sets of contents:

The first set of contents is to tell the story of what has been done. This can be called a **narrative report**. Usually, however, you are required not only to tell what has happened, but to comment on what progress has been made in implementing what was planned to happen. If there was never a plan, it is difficult to report on progress. So we can say organization and project reporting can only be as good as the planning.

In fact, organization and project planning and reporting should be like 'two sides of a coin'.



Discussions with Community workers

Some community workers in a community management training session were asked, "Why do you think reports should be written?"

These are some of their answers:

- to enable us to keep records;
- to inform all those interested
- to tell about failures and successes;
- for ourselves, to keep on knowing what we are doing;
- to communicate to donors and funders (*how the project progresses*); so donors could be encouraged knowing what happened with their donations;
- to let other people know about the developments of a project; so other people can be encouraged to do their own projects; so community members would be encouraged and informed; so other people can learn what we did;
- to help researchers to do their work;
- to determine further actions;
- to use for evaluation.

The real purpose of organization and project reports is for keeping an organization and its staff or team 'accountable'.

Let's face it, if **you** put up the cash to cover the cost of some activity or project, yourself, it's up to **you** whether you think writing a report about it is useful or not.

But the fact is, community organisations and their staff and teams are usually using someone else's money. They have been provided with resources to do a project or conduct activities that have been agreed on and the "someone" who provided the resources is not there to physically check that it is done.

Reporting is essentially the way that the organization and its staff or team demonstrates that they did not misuse the funds, that they actually carried out what had been agreed. It is reports that make those responsible for doing the work **accountable**.

So that's the first purpose. It is your way of proving that you did what you agreed to do or were contracted to do.

The 'narrative' and 'progress' approaches to reports

The simplest meaning of 'report' is that it tells a story. Here, where we will be discussing many different kinds of report, we can say this 'telling a story' can be called the **'narrative' approach**. A narrative or story tells about a series of events. You will find below that in organization and project reporting, there is sometimes a need for the 'narrative approach' or 'narrative reports'.

However, in organization and project reporting, often we are required to do more than tell a story.

That leads us to the second kind of report: The second kind of report uses the **'progress' approach**. A progress report not only tells a story. It compares what has happened on the way to completing something that was expected or planned.

In Chapter 2, you will be provided with an example of narrative and progress approach and will practice by yourself.

Monitoring and Evaluation

A progress report or the 'progress approach' can be used for a number of other purposes beyond accountability: it can be used to **monitor** whether the activity was carried out according to a plan. **Monitoring is an observation (or checking) tool.**

After that, the purpose of reports has to do with the results: Were the results of an activity (or more often a series of activities) effective in achieving the objective? Reports allow us to show whether or not the objective was achieved and if it was not, was it because the plan was not followed or could not be followed, or was it because the plan simply did not achieve what we thought it would. **This is evaluation. It's a learning tool.**

Usually a community service or project contract states very clearly what reports are required and makes clear that without reports, further funding will not be provided.

This reflects a combination of the accountability purpose and the monitoring and evaluation purpose.

Accountability: did the organization and its staff or team do what they said they would do with the funds provided?

Monitoring (was the activity carried out according to plan?) and **evaluation** (was it successful?).

Most reports will require us to use either the narrative approach or the progress approach, or a combination of the two.

What kind of reports are required depends on the kind of work being done. That is why report formats can be very important. This is also often where report writing becomes difficult, i.e. we do not know how to complete the report form or we do not know what is required of us. In Chapter 2 we will discuss different kinds of reports in terms of the use of the narrative approach and the progress approach. Then in Chapter 3 we will discuss different kinds of report formats.

Who benefits from reports?

A report is essentially a communication from report writer to report receiver.

The report is most clearly intended to benefit the receiver.

The receiver requires the report as part of 'managing' an organization or project. It makes possible accountability, monitoring and evaluation. Or in the case of the general report (see above) it allows the community (which is served in some way by the organization or project) to be kept well-informed about the achievements of the organization or the project.

The primary benefit is to the receiver of the report.

Benefits to the Author(s):

At first glance, one might assume that the benefits of reports are mainly to the recipient/s. We want to argue that the first beneficiary is the author (or authors). Why is that?

Again, we asked a group of community workers to suggest why the author or authors might benefit from writing a report. Here are some of their suggestions:

- Information kept inside one's head is disorganised;
- Writing a report helps us to arrange and organise the available information;
- Having to prepare a report makes us aware of any missing information;
- Preparing a report (or a series of reports) gives the author/s an overview.
- It clarifies the relationship between the activities (*input*) and the (*output*) results, i.e. it allows for self-monitoring;
- It prepares us to be able to make recommendations if and when the opportunity arises.
- This prepares us to be participants in shaping the work that we do, not just being 'dumb machines'. It prepares us to become managers.

2. Different kinds of reports

Some common kinds of organization and project reports

As a community worker you may have to write a range of reports for various reasons, depending on your job. For example

- Regular (e.g. monthly) reports on behalf of your department to your general manager or on behalf of your field office to your head office.
- Incident reports
- Monthly or quarterly progress reports
- Activity reports
- Workshop /training reports
- Meeting or conference reports.
- Travel reports e.g. to report on a field trip.

The following discussion is intended to help you to work out how to think about writing such reports, based on the discussion in Chapter 1 about the narrative approach and the progress approach, keeping in mind, accountability, monitoring and evaluation. Let's start with the idea of an incident report

Incident reports

An example of an incident report would be an accident report. It is the simplest example of a narrative report, i.e. it tells what occurred.

Regular (e.g. monthly) reports

For these it is necessary to consider whether a simple narrative report is required or whether you are required also to report on 'progress' towards some expected result. A regular monthly report in some cases simply summarises (narrative report) what have been the main organisation or project activities or events occurring in your department or area. In other cases, if there are clear 'goals' that your department or field office has been set, then these regular reports will also need to include a report on progress that has been made, i.e. what has been achieved compared with what was planned.

Activity Reports

Many staff or team members may be responsible for conducting an 'activity' and have been provided with funds in order to conduct the activity. For accountability, they need to show how the funds were spent in the form of an 'activity report'. An activity report may be a simple narrative report describing:

- When was it held?
- What was the duration?
- Where was it held?
- How many participants were involved? (and in community organisations, it is often required to state how many male and female participants were involved)
- What was the actual programme of activity
- Who were the resource persons involved?

Such a report is a bit like a receipt: it is the evidence that the activity was conducted. It is often accompanied by a signed attendance sheet and sometimes by photographs. This all contributes to accountability. However, sometimes the staff person or team member responsible may also be required to report on the success of the activity, so it can have added a kind of progress report component which reports on the success of the activity as compared with what was expected or planned (evaluation).

Workshop or training report

It is a kind of activity report. It may be a narrative report that describes what occurred, and/or it may be a progress report, i.e. describing the effectiveness of what occurred compared with what was expected or planned (evaluation).

Three examples of training reports are provided in additional documents ("Example 1 of an activity report - training"), (" Example 2 of an activity report - training") and ("Example 3 of an activity report - training"). The first two ones are a brief (summary) report, the third one is a more detailed report.

Meeting or conference reports

For many formal meetings, the best report is a copy of the minutes. However, you may want to give a report on a meeting you attended where there were no minutes, or a seminar or conference. For these it is probably best again consider again whether a simple narrative report is required, or should it also include a progress report. That will depend on your awareness of what was the goal of holding the meeting or attending the meeting. A progress report component can be used to compare what was achieved with what was expected or planned.

Travel reports

It is probably best to use the activity report approach, with instead of listing participants, listing the itinerary of where you went and what you did (narrative report). However, in many cases when you put in your travel report, you will be expected to discuss what was achieved compared with what was expected or planned, i.e. to include a 'progress' component.

Field trip report

Obviously a field trip report is a kind of travel report. A field trip should have a purpose, so your report on the trip should begin with indicating what the purpose of the trip was. The report should make clear whether or not you achieved what you set out to do on the trip.

Format

Most of the time, the format is rather simple, i.e.:

- Name of organization,
- Date of the trip,
- Location of the trip,
- Project summary,
- Project objectives
- Conclusion(s)

The report should describe:

- What you observed during the day or during the trip,
- What was valuable and informative during the day or the trip.

Example

Field Visit Report – Tamil Nadu, India

Name of Organization: Public Affairs Centre **Date of visit:** 13-16 November, 2010
Area of visit: District: Thoothukudi

Project Description: The project will focus on the Gulf of Mannar coastal areas of southern Tamil Nadu area where environmental concerns due to climate change and local human activity are significantly affecting the area's ecological biosphere and the livelihoods of the poorest that rely on it. The project aims to evolve strategies to adapt to climate change in a participatory manner and uses People's Participatory Geo-Information System (PPGIS) tool to map global warming effects.

Project Objectives:

- To develop a database of relevant information that will support advocacy for higher-level reform resulting in a more responsive environmental governance policy and regulatory system.
- To develop a tool(s) which facilitate citizen monitoring of the impact of climate change in their local areas and assess the effectiveness of local environmental regulation, and which generates an objective body of evidence on the impact of climate change on local livelihoods

Day 1

ANSA members met with the Project Director of East Coast Research & Development (ECDR), Mr. Pushparayan. A former Catholic Priest, Mr. Pushparayan became a campaigner for coastal/environmental issues and started ECRD in 2002. The meeting with him set the context for the field visits in Tamil Nadu as they highlighted several issues that ANSA would encounter while interacting with fisher folk communities. Some observations were particularly revealing:

- ✓ Some changes are beginning to define coastal livelihoods such as those listed below. But establishing the cause and effect relationships of these changes to livelihoods, and distinguishing the man-made from the natural causes are very difficult:
 - Mechanized fishing
 - Industrialization



- Climate change – such as temperature increases, coral bleaching, sea erosion, changes in wind pattern

- ✓ There is no one to truly represent fisher folk. Although political parties have different ideologies, eventually all support the activities of the multinational companies (MNC). There needs to be a separate constituency for coastal people as well as coastal panchayats just as there is for tribal people.

- ✓ The Gulf of Mannar Biosphere Reserve Trust (GOMBAR), a 450 crore initiative for 10 years, funded by the UNDP and the state and central government, was particularly noted to be unpopular and regarded by the fisher folk as anti-people due to its activities. These sentiments were consistently echoed by fisher folk in the field visits.

In order to improve the research and advocacy efforts of grassroots organizations such as ECRD, ANSA members along with PAC and PAD staff identified the following to be useful in the future:

- Collection of more scientific data, facts and evidence to support arguments for advocacy

- Legal support – although small organizations employ lawyers to argue cases for the people, MNC's are able to hire the country's top lawyers who are also the most expensive

- Establish a monitoring center which will activities of the MNC's, fisher folk and also changes to livelihoods

General Reports

Earlier in this chapter, we stated that “reports normally flow up a chain of management, i.e. from bottom to top”. So staff, team members are reporting to a coordinator, a coordinator may be reporting to a manager, the manager may be reporting to the funding organization (that s/he is accountable to). The discussion above, about activity reports, progress reports etc directly reflects the reporting needs within this chain of accountability. There is an important exception to this way of thinking about report writing. It concerns the reports that must come from an organization to the community. This is part of ‘accountability’, but is not a part of reporting up the management chain.

In the example below are presented two brief reports of a training workshop.

The reports were written by one of the participant, Kyaw Win, a community worker, who reported to his organization after the workshop.

The first is using the **narrative** approach, and the second one the **progress** approach.

The progress report is nearly similar to the first one. There are two more sections (evaluation and problems/comments/suggestions, paragraphs 12 and 13), which describes if the objectives of the activities have been achieved, and the achievements regarding the objectives of the project (section 5 in “project summary”).

Examples of reports using the narrative and progress approaches

Report of training workshop (narrative approach)

1. **Project Code:** Computer Practical Training for youth
2. **Date of Activity:** 1 – 2 September 2010
3. **Kind of Activity:** Training Workshop
4. **Topic of Activity:** Using the Internet To Learn (Computer and Internet skills)
5. **Project summary**

The project is aimed to reinforce capacities of community organisations helping the youth.

Objectives:

- Improve Computer and Internet skills of community workers
- Provide access to the Internet for community workers and their beneficiaries (ADSL Internet installation and computers)

6. **Objectives of Activity:**

Give capacities to Myanmar community workers for:

- a) Using Google as a search engine (Use Internet To Learn), and
- b) Finding free resources

7. **Place of Activity (venue):** Youth Resource Center (Mandalay / Myanmar)

8. **Number of participants:** 14

9. **Summary of Activity:**

Using Google as a search engine (Use Internet To Learn) & Finding free resources

Training focused on basic and advanced search techniques to use Google to find a website or other resources (power point etc). Practise through examples and computer work was essential (about 3 hours every day). The trainer also invited us to ask any other questions related to the Internet, which was a good way to improve my personal skills.

10. **Photographs:**



11. **Any other documentation provided:**

Learning materials:

- ✓ UITL reference manual
- ✓ multimedia materials (on a CD)

12. Report prepared by: Kyaw Win

Report of training workshop (progress approach)

1. **Project Code:** Youth Computer Practical Training for youth
2. **Date of Activity:** 1 – 2 September 2010
3. **Kind of Activity:** Training Workshop
4. **Topic of Activity:** Using the Internet To Learn (Computer and Internet skills)

5. Project summary

The project is aimed to reinforce capacities of community organisations helping the youth.

Objectives:

- Improve Computer and Internet skills of community workers
- Provide access to the Internet for community workers and their beneficiaries (ADSL Internet installation and computers)

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10. Photographs:



11. Any other documentation provided:

Learning materials:

- ✓ UITL reference manual
- ✓ multimedia materials (on a CD)

12. Evaluation

Comparison between the outcomes of the training and the expected achievements (as described in project and activity objectives)

The training gave me more confidence to search websites and information in the Internet. Learning to solve some technical problems, or understand some error messages will help me and my organization for an effective daily work.

13. Problems, comments, suggestions

Identify some problems happened during the training session, and make comments, suggestions to improve it in the future.

Some important parts of the reference manual should be translated in Myanmar, for a better understanding. I suggest my organization to give free access to the reference manual, and organize similar training for the staff.

14 Report prepared by: Kyaw Win

3. Different reporting formats

What is a reporting format?

Format has to do with design and shape, especially for a document. In some cases this may be to do with the size and shape of the page used, margin size, font and font size for example. More often it refers to the internal structure of the document.

For example, when school students learn to write essays, they are sometimes advised to use a three or 4 part format: introduction, one or two paragraphs or pages telling the main information, and conclusion.

This can be thought of as the sections, or for reporting purposes it is often useful to think of headings. Of course these sections or headings reflect ways of arranging or organizing information. So format for a report is closely connected to organizing the information.

A reporting format must 'fit' the kind of information the report is designed to give. As a report-writer, we may be able to design our own report-format, but more often we simply have to use the format that we have been given by our manager. Reports normally flow up a chain of management, i.e. from bottom to top.

The higher up the management chain we go, we can expect reports to be more to do with monitoring and evaluation connected with steering the organization or project. This will be reflected in reporting format.

You may be at some intermediate level on the organization, and that should give you some opportunity to design a reporting format for people who report to you.

Simple activity report format

A simple activity report format may look something like this:

| |
|--|
| XYZ Rural Health Service |
| Project name/code: Northern Women's Health Project (N-W2010) |
| Title of Activity: Malaria Awareness training 2 |
| Location of Activity: XYZ village |
| Date of Activity: 29-3-2010 |
| Number of Participants: 12 male, 17 female |
| Description of activity: This was a one day training provided by our northern women's health training and was the second in a series of 3 for this village. The training covered the following topics: <ul style="list-style-type: none">o Blah bla blao XYZo ABC |
| Comments/evaluation: Attendance was quite good although we hoped to have about 20 men and 20 women. The training went quite well but it was quite difficult at times to keep everybody concentrated because nearly all the women had brought children with them. |
| Reported by: K...M....K.... |
| Date: |

You can see it is essentially a narrative report, with the story reduced to main facts given under a series of **headings**.

You can also indicate the writer you are expecting a brief (or summary) or a detailed report, so that the writer knows the “**quantity**” of information to provide.

You can make it easier for the one filling in the report form by making clear any headings that may be filled in or may be left blank. (E.g., you can use * with a note making clear that * means ‘**optional**’; that way you can make it clear whether you are really looking for comments/evaluation or simply accepting them if they are given; it depends on the purpose of the report.

Filling in the Form

The only difficult part about completing this report (as long as you did remember to record the number of male and female participants) is what to write in the spaces **Description of Activity** and **Comments/Evaluation**.



Keep in mind: this is your opportunity to give your manager/supervisor/coordinator useful information. Try to indicate what was covered, (in this case, because it was the 2nd in a series of 3, it is probably necessary to be clear what has already been covered or not yet covered so that it is clear what to include in the 3rd session.) The opportunity to comment, gives you an opportunity to tell the coordinator that arrangements need to be made for child-minding if these training days are to be successful.

Interim Report

(example shown in additional document “Example of an Interim Report”)

Project progress reports are usually the responsibility of middle level managers. They are expected to have an overview and to be able to present it as part of their ‘accountability’. Progress reports therefore usually have a more complicated format than an activity report. An example is a **monthly** or **quarterly** report on some activity that will continue on for one year or two years for example. It is often called ‘interim report’. It is likely to require a careful mix of narrative and progress approaches with appropriate headings to make that clear. Most commonly it will include:

Summary of results/Achievements

The use of the word ‘summary’ usually means this section is very short: e.g. “The full range of planned activities was implemented in all project villages/training locations etc.” (Other wording for this heading might be ‘*Project overview*’, it is an opportunity to give a very brief narrative.)

Activities completed

This section is also narrative, telling what has happened. It can be simply a list of what was completed (with perhaps a ‘progress element’ by comparing what has been completed with what was the planned list of activities).

As with the simple activity format above, you may want to use this space to briefly summarise what was completed in each activity, rather than simply list them.

(Other wording for this heading might be ‘*Actual Progress towards Results Compared to Plans*’.)

Problems, deviations

(Other wording for this heading might be ‘*Challenges*’.)

This section is intended as an invitation to provide information about whether the planned activities have turned out to be practical or not. For example, you planned a series of activities for farmers but you miscalculated the agriculture seasons, so you had to delay the activities until after the harvest. Or, you planned to build certain items

using certain materials, which in some areas have turned out to be unavailable.

Conclusions

The conclusion could be very brief if the project is running according to plan, but it is your opportunity to pass on important information. If there are things that you know from your 'position' in the organization or project that your 'higher ups' need to know, here is the space to tell it. "Conclusions" is a heading that invites an 'opinion' based on observation and review.

- **Other headings** Some other headings often encountered in progress report formats may be:

- **Overall objective and project purpose**

(Which is often included before the summary of results; it can just be copied from the project proposal, it is an easy way for you as the report giver to remind the report receiver of what the agreed objective is);

- **Results/achievements (using indicators)**

(which refers to project proposals that follow the logical framework [logframe] method in which your planned activities will be groups to achieve 'results' with 'indicators' listed through which it can be seen whether the results are achieved or not); when the term indicators is used, it is clear you are being asked not for a narrative alone, but also for the progress in reaching the objectives.



➤ **Unexpected effects**

(which is asking you to note any unexpected results – good or bad – that may have occurred as a result of your activity which you think should be known for future planning; an example would be, “pig-raising for additional income was introduced and the unexpected effect was that families took their children out of school so that they could look after the pigs!”).

➤ **Assumptions**

(this is another ‘reminder’ heading which again refers to the ‘assumptions’ referred to in the project proposal; the inclusion of this heading in a project format is an invitation to you to comment on whether the assumptions still seem to be sound or not. For example, when planning the project you may have assumed that at the village

level people would happily give their time for training activities; if you have found that most people don’t want to attend, then your assumption was wrong and you need to make that known. Otherwise, under this heading you can usually simply list the assumptions and comment whether until now they seem to have been correct.



Self testing activity 3.1

Try preparing an interim report format and include with each heading simple instructions to the person who has to fill in the form.

Project Final Reports

(Example shown in additional document “Example of a final report”)

Final reports usually follow very similar formats to those used in interim reports with one main difference: they insist on evaluation of the achievements compared with what was planned.

In a simple format, there may just be a few additional headings, for example:

- **Evaluation of achievements** (which requires you to describe whether the project achieved its purpose and to give some evidence of this) and
- **Recommendations** (which invites you to say whether you think that such projects should be repeated, reformulated or abandoned).

More complex formats may include more e.g.

- **Sustainability**
(Which is asking you to describe what measures have been put in place to ensure that the results of the project don't just vanish at the end of the project), and
- **Lessons Learned**
(Which is really just alternative wording for ‘recommendations’, meaning ‘what should be kept in mind when planning and implementing similar projects in the future? What should have been done differently? What ideas are you proposing with regard to how to achieve the results more effectively?’).

A Note on Evaluation:

Evaluation involves:

- Looking at what the project or organisation intended to achieve and assessing its actual achievement.
- Looking at the strategy of the project or organisation. What was the strategy? The evaluation will likely ask was the strategy followed? If not, why not? It will also probably ask did the strategy work? If not, why not?

- Looking at how well the work was done. For example, were resources used efficiently?

Evaluation, looks at effectiveness, efficiency and finally, impact.

Evaluation may be conducted internally as part of management, and it may focus on any or all of these things. The findings of the evaluation will then be included in the final report. Evaluation may also be conducted externally, or independently, for example by a consultant hired by the funder who wants an independent opinion on how well an organization that it funds actually performs. In that case, the final report may simply report that an independent evaluation is to be, or was, carried out.

Summarising chapter 3...

In this chapter we have considered activity reports and what needs to be included in them, interim reports and what needs to be included in them. We noted that activity reports require only a simple narrative (sometimes summarized to give the facts under each heading) but there may be a 'progress approach' element included.

An interim report will be a mix of narrative and progress. A final report will follow a similar format to the interim report but the 'progress' element will be expanded with extra headings to allow for the final assessment of what was achieved compared with what was planned.



Self testing activity 3.2

In your own words explain the difference between an activity report, an interim report, and a final report.

General Reports

General reports are dealt with in more detail in the next topic. Let us simply note here that in community work, many occasions require general reports to be prepared, i.e. reports that are outside the routine management reports of organisations and projects. They could be used to 'report back' to the community, to report to a wider audience about a situation in the community, or to report on a piece of research that has been conducted concerning the situation and needs of the community. There is no single formula for general reports, it is a matter of what is the purpose. Undoubtedly, however, it will include some mix of the narrative and the progress approaches. 'General report' writing and can be the most challenging report writing of all. Why?

- When we prepare a report to a supervisor, coordinator, manager, we can assume they have some knowledge of what we are reporting about and experience in reading reports.
- When we report to the community, we face the challenge of giving information to a wide variety of people, including some who may have little knowledge of what we are reporting about and no experience at all of reading reports.

This is where we have to forget about trying to create practical useful formats and learning to fill in report formats, but instead to write 'readable' reports. In the next chapter we will discuss how to write better reports.

4. Writing Better General Reports

Identify the likely reader or audience

Before you start writing or even planning the report, you must make to yourself who you are writing for. If you know who will be the main readers of your report, then it will be much easier for you to think what information to present to them and how to present your information to them.

The thing about general reports is that they are likely to be intended for an audience outside your organization or project. For example, the Director of an organization may have to write an annual report on the activities of the organization to 'everybody who is interested in the organization'. Think who the key people or typical people reading the report will be.

- Try to work out what information these people probably are most interested in.

For example, these people may include people who funded the organization, people who did some voluntary work for the organization, people who agreed to rent a building to the organization, people who gave permission for the organization to be legally registered.

- Try to work out the headings that will reflect what you think are the main pieces of information. Once you are clear what are the main headings, you can collect the needed information.

Narrative approach or progress approach?

A general report usually is mainly a narrative report, but part of the narrative will be to tell about achievements.

Choosing an appropriate structure (or format) for the general report.

The format for a general report probably should be closer to an essay, than the reports 'up the management chain' that we have been discussing until now.

Remember, in the previous chapter we did mention how school students learning to use an introduction, one or two sections containing the main contents, and a final conclusion. This is probably also a good guide for thinking about a general report. This gives you the opportunity to keep the introduction and conclusion short and to the point, and the option to present the 'main contents' using the headings that were discussed above. One possibility for the format is to provide the main contents by using headings with brief bullet points, e.g.

Health

- Malaria awareness training has been conducted in every village
- Community health volunteers have been trained for every village
- etc

Another possibility is to provide information by giving examples of activities under various headings. As mentioned above, the general report may be much more like a report in a magazine than a report to a manager or funder. It is, however an important part of 'accountability'. In the end, ask yourself, 'is your report meeting the audience's need for information about what you are doing?'



Self testing activity 4.1

A community organization providing village clinics produces two annual reports. One is the final report sent to the funder and one is a general report sent to the village committees where the clinics are located. Make a list of headings that you think would be included in each report.

What makes a better report?

You have thought about who your readers are, you have thought about what kind of information they will be interested in and the headings to be used. We have thought about a very brief 'bullet point' report, but now let us think about the reports that actually must be written and that cannot be simply presented as bullet points. They need to be written, with real sentences and paragraphs.

Be concise

Very importantly, your reports should be "concise", meaning: try to work out how to **be brief but complete**. Don't write more than is needed, that helps to prevent the reading being bored. Short reports are more likely to be read than long reports. But reports that miss important information will be disappointing. That means your headings must be well-chosen, and the information under each heading must be well chosen.

Use simple language

A report is easier to read when it is written in **simple, straight forward language**. Do not try to impress your audience with flowery sentences, uncommon words, or long and complicated Use short, simple sentences. Using sub headings is a good way to separate (and draw attention to) the main pieces of information. Use short paragraphs. Workshop participants were asked what they thought would contribute to a general report being read carefully?

The participants came up with the following suggestions. It should:

- be short but complete (*concise*);
- containing only what is necessary;
- be simple; written straight forward language;
- have no repetition, nothing unnecessary;
- include no preaching, lecturing;
- contain interesting and relevant information;
- be well structured and organised;
- be attractively laid out (or neatly written or well-typed).

Now let's start on our report...

But before you start even the first sentence, first write down the headings. Let us imagine we are writing a family report. What should be the headings? Maybe something like this:

Mother. Father , Grandparents, Brothers, Sisters, Others

House, Garden

Next write down the list of the topics that you want to cover within each 'heading'. Make it a short list of three word sub-headings. Just use a scrap of paper; it is for your eyes only.

Under the heading **sisters**, maybe you write:

- ✓ Sister no. 1
- ✓ Sister no. 2
- ✓ Sister no. 3

Continue to do that with the other headings

e.g. **Grandparents**

Grandma who lives with us

Grandfather who lives in Bagu

Now consider the best order for the headings and the best order for the list of topics under each heading.



You might want to begin with headings that have the most interesting news or information.

For example, we may want to bring the heading **House** to the top of the list, because your family has been building a new room or replacing the roof.

Under the heading **Sisters**, you may want to bring **sister no. 3** to the top of the list because she has just started school but there's nothing too exciting to report about sisters no. 1 and 2 – it's just another year at school and university for them.

If you have done that, your headings are in the right order and your topics under each heading are in the right order, you have a first outline. Now you **are** ready to start.

Now try to think what the audience needs to know, which is probably: the major events, the major changes, the outlook. Write in easy to read, simple language. Use your outline and start writing sentences to 'cover' each of your topics under each heading.



Self testing activity 4.2

Try using simple sentences to 'cover' the topics under at least one of the headings in your family report. Is it easy to read?

Introduction and Conclusion

When your main 'contents' section, (the middle part of the student essay) is complete, you must think what needs to go into the opening section, introduction, and closing section, conclusion.

Clearly both of these relate to the contents. The introduction should normally include something of the background and the overall environment in which the activities to be described have taken place. It should set the scene for the reader. It should explain why the information in the report has been put together. It should not be a summary of the contents but it might indicate the most important development or the most important problems or the most important result.

The conclusion also should not be a summary of the contents. It would normally focus on what the overall combined results are of the activities that have been described and also look forward, i.e. what is the outlook for the period ahead. Here is an example:

Self-testing activities answers

Self testing activity 3.1

Try preparing an interim report format and include with each heading simple instructions to the person who has to fill in the form.

There can be no single 'correct answer'. Check your own against this example which comes from a university requiring students to conduct a 'project'. You may be able to locate many other relevant examples.

Project Reporting Format -Interim Report

(no more than 2 pages)

Date:

Reporting Period:

Project Number:

Project Title:

Project team leader(s):

Project team member(s):

Major Objective (s):

(describe what it is that you are trying to achieve)

Activities Underway or Completed:

Significant Achievements to Date:

Budget Status: (This section should include, but is not limited to, the following information):

under budget

budget on track

over budget

Describe any significant budget deviations to date.

Self testing activity 3.2

In your own words explain the difference between an activity report, an interim report, and a final report.

Your answer should refer to the kinds of headings that would be included in each but should make clear an activity report may or may not include a 'progress' component, an interim report will certainly include a number of headings to do with the progress being made (or not) while a final report will describe what has been achieved compared with what was planned and will include conclusions and recommendations.

Self testing activity 4.1

A community organization providing village clinics produces two annual reports. One is the final report sent to the funder and one is a general report sent to the village committees where the clinics are located. Make a list of headings that you think would be included in each report.

Here is an example of each for you to compare with your own. There is no single correct answer.

Report to funder:

Final Narrative Report Format

A. Project Summary

1. Project Title
2. Implementing Organization
3. Project Period
4. Project Location
5. Overall Objective of the Project

6. Target Group
7. Number of Direct Beneficiaries
8. Date of Report Submission

B. Background and Progress Summary

1. Project Background
(Give an overview of the project.)
2. Objectives According to Plans
(State the objective(s) of the project and indicate what progress has been made in achieving these objectives during the project period.)
3. Target Groups
(State the criteria for the selection of target groups. Were the criteria applied? Were any of the groups particularly difficult to reach? Specify the size and composition of the target groups, including a gender breakdown.)
4. Implementation
(Was the project carried out as planned and in accordance with the work plan? Describe any problems that have arisen and how they were solved.)
5. Results Achieved
(State the planned and actual results achieved by the project.)

C. Consequences / Effects

(Evaluate the consequences/effects of the project, including any undesirable side effects, for/on the target groups and their situation and environment.)

D. Lessons Learned

(Describe both positive and negative lessons learned. What should be kept in mind when planning and implementing similar projects in the future? What should have been done differently? What ideas does your organisation have with regard to follow-up?)

E. Budget vs Expenditure

(Explain any major deviations in the financial report for the period.)

Report to Village Committees

Introduction: 'The history of Community Clinics'

This year's developments

Staffing
Number of patients
Problems

The current financial situation:

Village Clinic A

Village Clinic B

Village Clinic C

Conclusions and recommendations:

Self testing activity 4.2

Try using simple sentences to 'cover' the topics under at least one of the headings in your family report. Is it easy to read?

Obviously there is no single correct answer. Have a look at the two examples below and see whether they seem to follow the recommendation for 'simple sentences' that are 'easy to read'.

Example 1.

Construction of the new bedroom which will be for the two youngest girls was begun in June. The new room is expected to be completed by the end of the year. It will be mainly made of brick and will have roof tiles to match the old part of the house.

Example 2.

Young sister was delayed coming home from work and was afraid she wouldn't be able to get home in time to feed the animals and it was all because the traffic that day was mixed up and mother tried to call her to let her know but father told her not to bother because I would be there to feed the animals and we don't know what happened to the traffic and what caused the problem.