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PMA
PERFORMANCE MONITORING FOR ACTION

STLR
SURVEY TRAINING & LEARNING RESOURCES

We invite you to use and adapt PMA STLR tools!

Whatever tool you discover and intend to try out, you will *need* to adapt these tools to your context.

This may include:

- ***Changing questionnaire question text*:** Some tools contain questions from our questionnaires (*publicly available here*), along with their numbering. Note that, in some cases, question numbering has changed across phases, but any questions cited in a tool use consistent numbering *within* that tool.
- ***Considering appropriate pronouns:*** We use female pronouns quite often, as PMA worked with female enumerators – *and* as a bonus, we are happy to use a feminine pronoun by default for a change!

TIP: ***Use our hashtag system!***

As we used these tools across various country contexts, we developed a simple system of using hashtags as placeholders for information that will need to be updated based on the country, context, culture, and program.

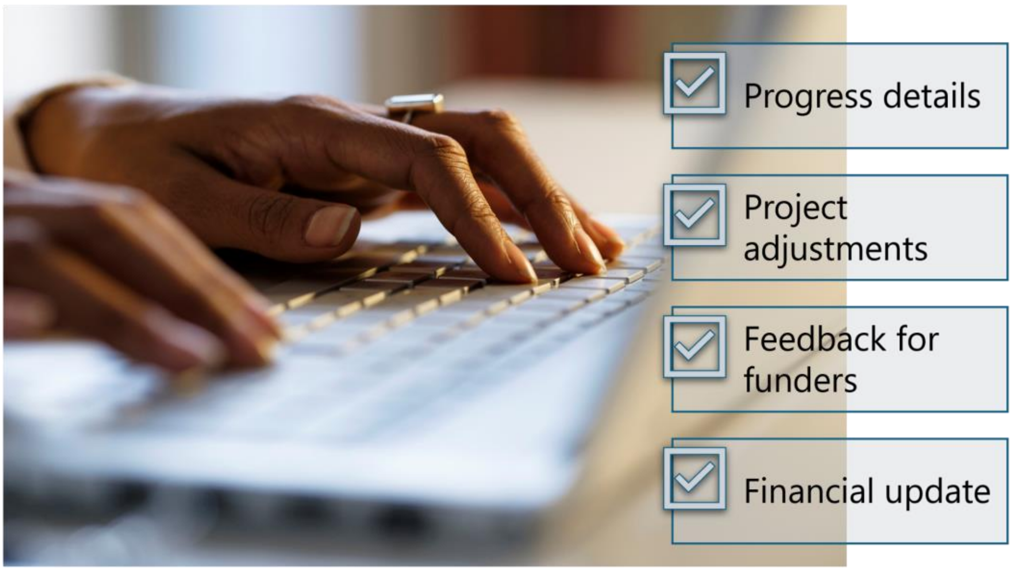
> For example, information in a tool that was country-specific is noted with the hashtag placeholder, *#countryspecific* – or possibly an even more specific placeholder like *#districtlevel* or *#localpartner*.

Information that required a change in date is noted with hashtags such as *#todaysdate* or *#lastyear*.

These hashtags allow those adapting the tool to use the Find&Replace function to quickly identify and update all instances of a hashtag within seconds.

Report Writing:
Best Practices and Tips

This manual is designed to help grantees write effective and clear program reports for donor/funding agencies and organizations.



When adopting, adapting, and sharing this tool, please use this suggested citation:

“Report Writing: Best Practices and Tips”, created by Selamawit Desta for PMA Ethiopia. The William H. Gates Institute for Population and Reproductive Health at The Johns Hopkins Bloomberg School of Public Health. Performance Monitoring for Action Ethiopia (PMA-ET). Released September 2024.

REPORT WRITING:

BEST PRACTICES AND TIPS

PMA
PERFORMANCE MONITORING FOR ACTION
ETHIOPIA

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Best Practices for Report Writing: A Guide for Writing Program Reports

This document summarizes best practices and tips from the PMA Ethiopia JHU team about effectively planning and writing reports for donors.

The suggestions and recommendations in this document focus on routine grant reports required by *our funders;* the reporting content and requirements for your funders will vary but are likely to be similar to ours.

For our team, this has typically included annual and quarterly reports. **This resource focuses specifically on drafting and writing annual required program reports.** As an overall best practice for preparing annual reports for any funder, it is crucial that you are fully aware of the requirements of the funder, the documents that must be completed and submitted, and the required deadlines.

This document provides best practices, recommendations, and exercises to help you take on the responsibility of writing program reports for donor/funding agencies and organizations.

The overall objectives of this document are:

- To summarize best practices for each stage of the process involved in drafting an annual report for donors.

- To serve as a resource for staff to continue to refine skills and train new and additional staff on some of the contents included.

Note to STLR users about these exercises

In this manual, we have included exercises that correspond to the content and application of this content. These exercises are meant to give the learner an opportunity to apply what they learned in order to better understand it and identify what is not yet clear to them. As you review their exercises, you can also learn which concepts and skills will need further development and improve your report writing accordingly.

The below exercises are specific to PMA content. **We encourage you to maintain these exercises but adapt them heavily to meet your context and the needs of your team. You will also need to ensure that someone is in charge of receiving and providing feedback on the exercises that learners submit.**

Because the right answer(s) will depend on the modified question, as well as on the specifics and protocols of your team, we have *not* included an answer key. We highly suggest you develop an answer key to fit your modified questions and your context.

Your task:

As a participant in this hybrid virtual and in-person training, you are expected to:

- Review each section in detail.
- Complete each assigned task within the stated timeframe.
- Ask questions frequently.
- Provide feedback frequently.
- Refer to and read the accompanying resources where indicated.
- Contribute, in-real time, to the drafting and writing of the annual report.

The Planning Phase

✓ **As an overall best practice, we strongly recommend that** all teams routinely **document all major activities** throughout the project year. We also recommend saving all relevant notes, emails, and attachments to a joint shared folder.

  - At PMA Ethiopia, we include the most relevant updates in our quarterly reports to funders, so these quarterly reports are excellent resources when compiling the content for the annual report.
  - In addition to referring back to quarterly reports, we encourage staff to also refer back to meeting notes, dissemination reports, training reports, meetings with the Ministry of Health, and reports from other project events and activities.
  - The team should have a designated note taker for each planned event and activity to make compiling information for the annual report easier.
    If any activities were significantly delayed (i.e., into the next project year) or canceled, be sure to note at the time that the decision was made to postpone or cancel the activity and document why that decision was made.

✓ Identify those who will be contributors and reviewers of the report and develop a workplan and accompanying timeline.

  - **Lead:** There should be a **lead writer** and coordinator.
  - **Reviewers:** Identify reviewers and contact them with deadlines and timelines early in the process.
  - **Contributors:** Reach out to them months in advance to inform them of timelines and ask them to share relevant details about progress in their respective workstreams.
  - **Ensure that the finance team is aware of the deliverables they are responsible for and clear on timelines and deadlines.**
  - Update the program director(s) on timelines, plans and overall progress, as requested.

Typically, the planning phases are when we start planning timelines, mapping out content, and drafting a division of labor. This work usually begins **at least 4 months prior to submission date.**

Remember the Timeline!

Many of these steps will be taken collaboratively across multiple teams and staff, so be sure to work with the writing team to (1) organize who will be responsible for the different sections and changes, and (2) develop a timeline for the work ahead.

Checklist before writing

- ✓ Ensure you are using the correct templates sent from the funder. Make sure that you have templates for all the documents that are required for the submission. For our funders this has included:
    - Program narrative
    - Budget templates
    - Budget narrative
    - Results framework
- ✓ Develop timelines for drafts and content from contributors and the program director(s). Be sure to provide clear guidelines for what you need from each contributor/team.
- ✓ Make sure that everyone working on the report is aware of roles, expectations, and timelines.
- ✓ Make sure that sufficient time is available for a thorough review.
- ✓ Making the report submission deadline is critical!

Important reminder:

The writing for program reports has to be coherent and clear. Please ensure there are no spelling or grammatical errors. You can use Grammarly or other AI-based grammar and writing tools to check for grammatical and other errors.

Deeper Dive: Components of the Program Narrative

While each component of the program report is important, the program narrative, for most funders, typically makes up the bulk of the report. It is generally the longest portion of the report-- summarizing key achievements and setbacks in the specific reporting period. Organizing and writing content for this portion of the report also takes the longest time because of the length and typically requires input and review from several team members.

The sections of the program narrative are described in detail below:

1. **Progress details**
    - This is the lengthiest portion of the document. In this section, you will need to summarize major activities and any setbacks/challenges that occurred during that reporting period.
    - The section details activities by each primary objective/outcome.

- The activities that are detailed in this section of the report are typically aligned with the activities in the results framework.
- Under each activity there are typically sub-activities detailing the various efforts the team worked on toward the specified goal.
- For example, if main outcome is to increase data use, then sub-sections to detail progress toward this outcome could include:
    i. Our data on quality of counseling has led to targeted interventions by the Ministry of Health.
    ii. Our data was used to inform National Costed Implementation Plan.
    iii. Ongoing and fruitful collaboration with the Ministry of Health Communication Directorate.
    iv. Dignitaries from the Ministry of Health publicly speak to value of our team's data at multiple public events.
    v. PMA Ethiopia data continue to be included as data source for the Ministry of Health performance monitoring systems.
    vi. Action planning with Regional Health Bureaus (RHBs).
    vii. Stakeholder utilization of data to inform programming.

- For all the sub-sections in the program report (e.g., i-vii in the example above), please include details of the related activities. This can include links to attachments and key documents that further demonstrate the progress being described.

- The three primary outcomes of the project do not change from year to year; however, the described activities and sub-sections are largely determined by the specific activities that were completed, started or ongoing during the respective reporting period. That is, do not follow the same structure and content from previous years. **Adapt the material to reflect the activities completed within the relevant reporting period.**

Overall best practices in the progress detail section:

- **Where possible try to include graphs, images, and infographics to break up the text.**
- **Include as much relevant details without being wordy.**
- **Elaborate as much as possible on any examples of data use.**

Key points to remember:

Funders are **always keen to know how the project is achieving its stated goals**. Therefore, **as much detail** that can be provided to support the examples of progress the better. If there are accompanying reports, or additional documents that help further illustrate achievement be sure to include those and **be as specific as possible**. What data were used (panel or cross-section)? **What indicator(s) are used? What was the outcome?** If the activity is not completed by the time of the report (training materials or publications that use our data) be sure to note that and also note that you will share as soon as those materials become available.

2. **Project adjustments**
    - This section typically describes any major changes that occurred in that project year. In the past this has included the delay in field activities in year one due to the COVID-19 pandemic and related cost impacts etc. If this section hints at a need for additional funds (e.g., supplement), be sure to be very specific as to why that is absolutely needed, demonstrate that you have exhausted all other options, and indicate an overall dollar amount. Do not provide detailed rationale for a supplement here. Indicating why and how much is enough. If the funder agrees to this request, they will invite you to submit a formal request for a supplement and that is when you can provide details.

3. **Feedback for the funders**

    This section is typically very brief. In general, we would advise that you include some positive and one or two suggestions for constructive feedback. Please refer to previous annual reports to see the tone and content included.

4. **Financial update**
    - Last period variance:
        i. This section should include descriptions and justifications for any expenditures that are over or under the allowable variance rate (as determined by the funder) per cost category.
        ii. As a best practice, try to limit wordiness here. Detail is good in the program areas, but what is critical for the finance section is being very specific with the descriptions. Focus on synthesizing the reasons why you were over/underspent in that cost category. A good example of concise writing is below:
            - *This cost category is underspent by -22%. The variance is due to a research assistant returning to schooling full time, staff turnover, and a small credit received in the project year for a faculty member who left the project. There was no negative impact on the project.*
    - Future period projections:
        i. This section should describe projections for future years and any anticipated variance as compared to the previous annual report.

The Information Gathering & Writing Phase

What is **critical to incorporate and highlight** in every section of the report is **content that the funders are particularly interested in**. Some points have been raised above and repeated here because they are critical to writing a strong report.

For PMAET this has typically included:

- **Clear examples of data use for Cross-Sectional and Panel data:**
    - For policy and program changes.
    - Listing publications also falls under this topical area; however, our funders have been keenly interested to know how the data are being used by the Ministry of Health, RHBs, program implementers in the country to change and/or inform policies and program decisions.
    - Be sure to include as many details as possible. When possible, include links to relevant documents – official Ministry of Health documents, reports, ministerial speeches.
    - If some data use examples were mentioned in previous reports, where possible, please continue to provide updates and relevant follow-up.
    - If the Ministry of Health or other key stakeholders made commitments try to highlight the action accompanying those statements of commitment and not just listing the statements of commitment.
    - Details on ongoing collaboration with the Ministry of Health Communications team are also important to include.

- **Relevant collaborations with other stakeholders:**
    - If the project collaborated with other organizations or stakeholders in developing briefs or worked together in some other way, please include as much detail as possible.
    - If the Ministry of Health or other key stakeholders requested additional analysis, please provide details on those requests:
        - Details on the actual requests
        - Products/deliverables that were created for the request.
        - Relevant follow-up after submitting the analysis/request.

- Participation in **technical working groups** – meetings attended, specific contributions of our team, requests of the team etc.

- Engagement with RHBs:
    - Data use workshops
    - Ongoing engagement and as with the rest of the report, please include as many relevant details as possible.

- **Summary of any discussions with other funders** on potential and/or committed funding components of the survey.

- Where possible, try to summarize content in compelling graphics; *see previous reports*

The above lists key areas of interest that many funders explicitly request detail on in their reports. As you work with your respective funder(s) be sure to clarify and understand key areas of interest that they would like included and detailed.

Apply It to Try It!

✍ EXERCISE 1.1: Using materials from previous quarterly reports to develop content

Context:

Drafting content for the annual report is usually the process's most time-consuming part. As stated above, those responsible for gathering information for the progress narrative should review meeting notes from routine team meetings, quarterly reports, event meeting notes (e.g., dissemination meeting notes, etc.). Once you have gathered key information from existing resources you should organize the material according to the sections of the annual report.

Instructions:
To practice this skill, we are including a task below:

1. Read the excerpt from a previous quarterly report below.
2. **Based on the excerpt draft content for the below activity of the annual report progress narrative**:
    - *Primary Investment Outcome 1: Ensuring country ownership and leadership to institutionalize the PMA platform within the country's data architecture.*
    - *Activity 1: Increase the actionability and country ownership of data.*
3. The activity above often includes multiple sub-activities, so it will be up to you to decide what activities you can report here.
4. In the real world, you will often need to reach out to colleagues to get more details, attachments, and other information. For this short assignment you do not need to reach out to colleagues. The main aim is to gain experience in the initial drafting phases, think about and organize content, and draft language.
5. The specific guidelines here (*read the below and draft content*) are somewhat vague. When you are drafting actual content for the annual report you have to work with various information sources and determine the content that will go into the report, the structure of the report, and the sections by which it will be organized.
   Email your draft to the team's report submission contact person within the specified timeframe.

Excerpt from previous quarterly report

2023 Data use workshop preparation

- The Country team, in collaboration with the JHU team, has been developing data use workshop materials for two audiences:
    - The first is for the Ministry of Health and Regional Health Bureau delegates. The primary aim of this workshop is to encourage use of PMA Ethiopia RMNCH cohort data with the Ministry of Health and RHB officials.
    - The second workshop is for an academic audience of faculty, post-doctoral candidates and PhD students from regional universities. The key aim of this workshop is to introduce PMA Ethiopia cohort data to Ethiopian-based academic audience and increase data use and publications that use PMAET data by Ethiopian-based researchers.
- To respond to region-specific data needs of Regional Health Bureau officials, the data management team produced disaggregated results of all indicators presented at the cohort one disseminations by key variables (region, age, residence, education, parity, and wealth index).
- The data management team is also working on preparing interactive Excel dashboards using pivot tables and pivot charts so that participants can explore the disaggregated analysis for key indicators and develop action plans accordingly.
- The Data Use Workshops are tentatively scheduled for early August 2023.

EXERCISE 1.2: Using materials from dissemination notes for annual report content.

Context:

Drafting content for the annual report requires you to reference multiple sources – meeting notes, emails, quarterly reports, and event meeting notes (e.g., dissemination meeting notes etc.). This exercise provides you the opportunity to practice this activity.

Instructions:

1. Read the excerpt below of the dissemination report.
2. Using the excerpt, develop draft content for the annual report.
    a. Determine an appropriate sub-heading for this content in the report and determine what activity and objective this summary falls under.
    b. Determine what section of the annual report the summary should go in.
    c. Determine if you will include any photos or attachments for this section.
    d. Write the draft content.
    e. Email your draft to the report writing training facilitator within the specified timeframe.

Note: The below comes from one dissemination meeting, when developing actual content for the annual report you can draw from different sources and resources to strengthen the points being made about the dissemination.

Excerpt from previous dissemination report:

Way forward

The Minister of Health made the concluding remarks by acknowledging everyone who took part in the realization of the survey. She also appreciated the funder for the generous support of the PMA Ethiopia project. Following that she suggested the following action points:

- The survey is conducted in four regions and needed to have discussion in the respective regions for better action. Regions specific information can be used to facilitate such region-specific meetings.
- MoH encourages other donors to support the continuation of the survey, with additional funding including donors such as USAID.
- MoH commits to realize the findings into action. Many of the indicators will be input for the policy brief.
- MoH plans to include some of the findings in the fourth quarter of this Ethiopia fiscal year and also use the rest for the next Ethiopian fiscal year planning.
- All desk representatives of MoH who attended the dissemination must take action points from these findings and advise their offices, respectively.

Implementing partners are urged to help in the realization of these findings into actions.

Financial Narratives

The finance lead should be the one tasked with writing this portion of the report. This person should also be in charge of preparing the budget for the submission.

Best practices and tips:

- **Content should be concise, to the point, and clearly written.**
    - Do not include additional content in this portion of the report. As a best practice, focus on providing short explanations for each section. If there are unexplained variances, please try to be very concise in describing those variances.
    - It is critically important to ensure that what is written in the narrative does not raise any red flags or open the project to undue scrutiny. When writing content, be sure to review, re-review and have others on the team review.
    - Please refer back to previous reports edited by the JHU for examples of how to cut down on length.
- **Ensure that totals and values in the narrative match with those in budget to be submitted along with the report.**
- If you have stated any percentage point changes in the report (e.g., "*there was a 20% increase in spending for the personnel cost category when comparing PY3 to PY4*") please ensure that you are using the correct year of reference to determine that level of change.

- Ensure that all reporting requirements on currency gains/losses are recorded in the way the funder has required and requested.
- If including supplemental materials please discuss as a larger team if those materials benefit in making the report stronger, or if that may confuse the reader or bring undue scrutiny.

Apply It to Try It!

EXERCISE 1.3: Using draft language from previous annual report to improve

Context:

Similar to the work of drafting content for the progress narrative portion of the annual report, the financial narrative is a collaborative process that typically involves the finance lead and program team working together to develop and draft content.

Unlike previous exercises in this guide, this exercise asks that you read the below draft text and suggest ways to improve it.

Instructions:

- Read the excerpted content, below, from a previous draft version of a financial report narrative.
- *Using track changes and comments*, indicate any areas or content you would suggest needs more work, clarifications needed, improved writing is needed, and any other feedback.
- Be sure to refer to the best practices listed in this section while you are working on this.
    - **Note, you do not need to see an accompanying budget for this exercise as the focus is mostly on writing and editing clear and concise narrative.**
    - **When working on the financial narrative, PLEASE double (and triple) check that the amounts stated in the narrative align with the submitted budget.**
    - **Email your draft to the report-writing training facilitator within the specified timeframe.**

Excerpt from financial narrative:

Personnel:

The personnel line is slightly overspent with a variance of 1%. The reason for this variance is because of administration changes that affected salaries and compensations. These included a pause to the standard 3% merit increase and pauses to fringe benefits. These measures were eased mid-way through the project year and thus contributed to this modest variance. This percentage is within the allowable range.

Travel:

Travel line item was unspent. We will shift any unspent into the following year.

Consultants:

The consultant line is underspent and has a variance of 94%. The variance in this cost category is due to changed timelines.

Other Direct Costs:

The other direct costs are overspent by 63%. This is related to the initial delay and knock-on effects to the first cohort, which has extended into the following year. Further, the COVID-19 pandemic, caused shipping delays. Also, due to the pandemic, dissemination timelines were shifted and this enabled PMA Ethiopia to cover the unanticipated costs related to post COVID training facility costs, the procurement of PPE for the field team and respondents to minimize the transmission of COVID-19. Again, similar to other cost categories, despite unforeseen costs related this cost category remains overrspent due to the major delays in initial field work timelines and PPE costs.

Results Tracker

The results tracker includes prepopulated activities, outcomes, and deliverables from previous year.

The document includes a short guide of how to update it on the first tab.

Apply It to Try It!

EXERCISE 1.4: Using draft language from previous annual report to improve

Context:

The results tracker is a document that should be updated yearly to summarize progress against each outcome and indicator. When our funders send the template documents they send in the version from the previous year. Your job is to update the progress for the project year being reported on.

Instructions:

- Using the table below, please update the content to reflect the relevant achievements for your project?
- You can write over/directly edit the text in the table below when making your changes for this assignment.
- The content developed here will be used in this year's results tracker.
    - **Email your draft to the report-writing training facilitator within the specified timeframe.**

Example from a previous Results Tracker:

ID	Outcome/Output	Indicator(s)	Data Sources *(if applicable)*	Baseline	Payment Contingency *(if applicable)*	Comments
1.1	Increase the actionability and country ownership of data through implementation of a data translation plan	PMA data incorporated into policy and planning documents	Policy and planning documents Requests for additional analyses Region-specific action plans			PMA data is a main data source in modeling analysis for FMoH. PMAET has established a formal working relationship and agreement with FMoH's Communication Directorate. As such, all project dissemination materials are shared via MOH's formal communication channels.

ATTACHMENTS TO THE ANNUAL REPORT

We often include relevant attachments to the report. These are not required by our funders but go a long way in supporting and providing evidence of the content included and achievements stated in the report.

In the past this have included:

- PowerPoint presentations organized by seconded staff
- Policy documents that cite PMA data
- Other documents that will support and demonstrate achievements of the project as mentioned in the narrative

Key Takeaways

- ✓ **Have a well-organized plan in place before you start writing. Develop timelines and workplans and inform those who will help with developing, writing, and reviewing the report ahead of time.**
- ✓ **Give yourself enough time to make a high-quality product.**
- ✓ **Strong program reports help strengthen your relationship with your donor.**
- ✓ **Program reports should be concise – present only the key information and take everything else out.**
- ✓ **Always ask the "so what" question- this is what the reader is interested in.**
- ✓ **Good reports – correct, clear, concise, and conversational.**
- ✓ **Make sure your report meets your organizational standards and funder requirements and standards.**
- ✓ **Use infographics, images, graphs and visualizations where possible.**

Remember this is your opportunity to highlight all your hard work!