GUIDELINES FOR WRITING REPORTS

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Introduction

Reports are important management tools for influencing future actions. Through reports, information can be shared and consequently lessons learned.

However, good report writing is not easy and it is very time consuming. In addition, if a report is not easy to read, it probably will not be read at all.

In these guidelines attention is paid to report writing in general and, in particular, to the Project Progress Report. If the ideas or words being used in these guidelines are not familiar to you, please look at the manual ‘How to build a good small NGO’, chapters 3 through 6, on the www.networklearning.org site, or ask for more explanation by e-mailing to: ginneken.noordman@wxs.nl.

REPORT WRITING IN GENERAL

Preparation for report writing

**Subject:** Decide which kind of information needs to be in the report. Be as precise as possible. For donors, four types of information are usually needed:

1. What the results are so far of the implementation of the project (impact development information)
2. Which activities have been implemented so far. Is this according to the project proposal? (Activity implementation information)
3. How was the money spent? (finance/budget information)
4. Information about the project staff.

**Purpose:** Determine what the purpose of the report is. Is it to inform others so that they become interested in the project? Or is it a presentation of the results of the project to e.g. your donor?

**Layout:** Check whether the report needs to be written in a compulsory layout (e.g. type of paper, headings footings, standardised form, etc.)

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1 Retrieved from www.networklearning.org
**Target group:** Determine who the readers of the report will be. The contents of the report need to be adjusted to the people who will read it. E.g. How much information do they already have about the project?

In a progress report with the purpose to keep readers informed, only the latest information is needed. If you want to present the project to a potential donor, or you want to inform other outsiders, you need to be more elaborate in explaining where the project is all about. The target group will also determine the level of language you need to use.

**Structure:** Check how the contents of the report need to be arranged.

**Length:** Determine the maximum number of pages in consultation with whoever commissioned the report.

**Time span:** Check out when the report needs to be ready. Then make a time plan for your-selves for writing the report (date for completing the first draft, date for having it checked by a senior colleague etc).

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**The actual writing of the report**

*Collect the information needed.*

Important sources are: reports, notes which have been written earlier, books, information from your monitoring system, interviews with staff/target groups etc.

*Arrange your information in a logical way and take care the structure is well balanced.*

The way the report is divided determines the structure. Make use of chapters, paragraphs, sub-paragraphs. Chapters need to be roughly the same length. Paragraphs should be a logical subdivision of the chapters. Keep each short and make sure that one sub-paragraph covers one subject.

*Write the language of your reader* – not childish or over-sophisticated. Avoid long and complicated sentences (not longer than 15 –20 words). Take care that the report is easy readable without reference to other literature. If needed, use footnotes to explain certain concepts/ideas.

*Try not to make any spelling mistakes.*

If you are writing on a computer, use the spell-check.

*Make sure the layout is well organised.*

The reader will give up quickly if it takes too much effort to follow the line of your argument. Make sure that there is enough space between the lines, paragraphs etc.

*Check the result by asking the following:*

1. Does the report answer the questions raised by whoever commissioned it?
2. Is the structure logical and well balanced? Is the order of the topics correct?
3. Have the pages been numbered and is this according to the Index?
4. Has somebody else read the report and asked for feedback, before you sent it to the person who commissioned it?
The different parts of your report

Depending on the purpose of the report, you can choose different ways of arranging the content. The following division is the most common:

**The cover:** (preferably of a heavier quality of paper than the rest of the report). On the cover it should mention:

- The title of the report;
- The sub-title (if appropriate);
- The name of the author(s);
- The date of the presentation of the report.

Depending on whether your report is for internal or external use, you can mention your own organisation and/or the organisation for whom the report is written, e.g. the donor organisation.

**The title page:** this is not always necessary. Usually the information of the cover page is repeated. If applicable, information on copyrights, distribution etc. could be mentioned here.

**The Index:** this should be a separate page on which the chapters and paragraphs are listed and are next to the appropriate page number. Only the first page number of each chapter is listed.

**The foreword:** this is not always needed; again it depends on the type of report. In the foreword issues are mentioned which are not essential to the contents of the report, like: words of thanks, for whom the report was written, by whom and why etc.

**The executive summary:** the executive summary is very important because not everybody has time to read the whole report. In the executive summary, the most important points are presented:

- the reason why the report was written;
- the questions which are to be raised (problem statement);
- the solutions;
- the arguments used for the solutions;
- important conclusions and advice.

**The main text of the report:** The main text is most commonly divided into the following chapters:

*Introduction:* this indicates the structure of the report. In the introduction often issues are described which are obvious to the writer of the report, but not to the reader. By reading the introduction, the reader should understand what exactly the report is all about; which topics are included, which are not and why; how the information was obtained; why the report was written; what the aims of the report are (e.g. is the report written to present information, to advise, to evaluate?) etc.

*Clarification of the problem statement:* this chapter explains why the information is needed, which information is needed and how the information obtained will be used. (or what the problem is, why the problem needs to be solved and which information is needed to be able to solve the problem).

*Methodology:* a short description of how the information was obtained (methodology). The results, with an interpretation and description of the information obtained.
Conclusions of the results

Recommendations: it is better to make recommendations for each conclusion or group of conclusions.

Annexes: if information or explanations which take up a lot of space and attention are in the text then they can make the report difficult to read. This type of information is often put in the Annexes. For example: a literature list (references to literature used in the report), detailed explanations, examples, drawings, maps, list of abbreviations etc.

Annexes should be numbered and should have a title. In the main report, references should be made to the annexes when needed. Annexes are also listed in the Index.

THE PROJECT PROGRESS REPORT

About Project Progress Report (PPRs)

Extra attention should be paid to the Project Progress Report. A project manager should prepare them on a regular basis. They are often for internal use and are based on your monitoring system (see ‘How to build a good small NGO’ chapter 6 Ref 1.).

The information will help you to know how the project is going. You can share this information with colleagues or beneficiaries; you can discuss its contents with more senior management or with other units and you can feed the lessons learned back into the next round of planning. These project progress reports will also form the basis for your reports to governments and donors. (see above under ‘Report writing in general’).

Project Progress Reports may be produced monthly, quarterly, annually or according to any timetable that is agreed on. They may be structured or presented in a number of different ways. By standardising the structure of the report they will be easier to complete. More importantly, comparison can be made between reports over time.

The basic layout of a progress report should include the following items:

- the activity or work area being considered;
- a time schedule for the period you are reporting on and completed activities;
- targets which have been reached during the period;
- budget and actual expenditures (inputs and costs);
- problems/constraints experienced and management action required.

In addition there may be details about revenue and manpower, and reference to activities related to the project but not directly under the project management control.

The reports usually contain a mixture of narrative comment and quantitative data. They should make clear what was planned and what was achieved or when targets were not set, what was achieved in the same period the year before.

PPRs provide an important source of information over time about activities and their outputs. Their usefulness will depend on the regularity with which they are completed and their quality. The common problems of PPRs are that they are too lengthy, with poor or incomplete coverage of the key issues. They are often largely descriptive, rather than focussed on performance and management action.
Checklist for writing a Project Progress Report (PPR)

a. **Objectives.** A PPR should refer to all the objectives of the project components reported on and on the outputs.

b. **Indicators.** Progress should be reported on the basis of indicators which are described in the project proposal. PPRs should use the same indicators throughout the project period. This way, performance over a long time period can be analysed.

c. **Targets.** For each indicator there should be a target and preferably the targets should be all of the same consistency: e.g. all targets are (bi) annual. This makes them easier to compare and interpret.

d. **Narrative content.** The purpose of writing PPRs is to identify progress towards producing outputs and meeting objectives. It should be output-oriented. In practice, many PPRs tell what has been done in the style of a diary. Though often interesting, this is less helpful.

e. **Management analysis.** This should focus on actions that require the attention of more senior management, or other units, divisions or departments outside of the control of the project manager.

The purpose of the analysis is to improve and support the implementation of the project. Specific attention should be paid to distinguishing between the following types of possible problems which may have an impact on the achievement of the project:

- Objectives;
- project design weakness;
- accuracy of planning and budgeting;
- resource constraints;
- coordinating problems;
- management problems internal to the organisation;
- adverse external environment.

Understanding the nature of the problems being faced will help ensure that appropriate action is being taken.

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**Flash reports**

A useful format for providing a quick structured report on project progress and issues requiring actions is shown below. Such reports should be limited to one page only and are designed to highlight key issues while requiring the minimum amount of paper work. The flash report is ideally suited to be a monthly update for transmission through a fax machine.
References:

1. ‘How to build a good small NGO’