Technical Writing Community of Practice (TWCOP) Meeting for FY22 Q1

pact building local promise.

Topic: Programmatic Reporting

12 October 2021

Presented by:

Rachel Elrom and Ann Bloome

Today’s Agenda

- Updates from the Technical Writing and Editing (TWE) team
- Topic presentation: Programmatic reporting
- Discussion: How is your programmatic reporting going?

TWE Updates

- Hiring for the Governance and CD&I proposal and technical writer position ongoing
- Third technical writer position under development
- Forthcoming resources:
  - Proposal Writer’s Guide to Greatness
  - Pact style guide
- TWCOP space on Mosaic 2.0: https://mosaic.pactworld.org/communities/cops/twcop

Why is producing quality program reports important?

- We’re accountable to our funders and the people we serve.
- We want to show that we’re good stewards of funding.
- We want to win follow-on business.
- We need information to drive new business and thought leadership activities.
- We want to underscore our teams’ strengths and capabilities.

The "Dos" of Quality Reporting

- Use a standard template, formal process, and reporting tools all created well ahead of time
- Roll reporting duties into job descriptions, and notify staff of reporting roles and responsibilities at least at the beginning of each year
- Include accurate, complete data captured by the project's MEL system
- Include a description of how the project is structured, including its goals, approaches, results framework, geography, and target populations
- Build on previous reports
- Always use active voice so it's clear who did what
- Specify *why* the project did something and *why* it matters
- Celebrate when we meet targets, do anything notable, and go above and beyond

The Don’ts of Quality Reporting

- Take liberties with writing style
- Overload the report with multiple heading levels
- Elaborate on an activity’s every detail
- Report on anything that happened after the end of the reporting period
- Emphasize one staff member’s achievements over the project’s
- Stray from the project’s results framework or workplan structure

What does quality report writing look like?

Example 1: Not so good-quality report writing:

Project Pact is creating a new training manual. It will be called How to Do Everything. The training manual will be written specifically for the local organizations we work with and will teach them all about everything. In Q1, Jane Smith (Training Advisor) surveyed the organizations to get feedback on their training needs. She also drafted the first draft of the training manual. In Q2, Ms. Smith sent the training manual for review, then incorporated feedback from stakeholders. Next quarter (Q3), Jane will pilot the draft manual with some of the project's partner organizations, before finalizing it in Q4.

What makes this reporting less than ideal?

What would you change to improve the text?

What does quality report writing look like?

Example 2: Good-quality report writing

Project Pact is creating a new training program, called How to Do Everything, for the local organizations supported by the project. The program will consist of training sessions followed by a one-to-one mentorship, which is an innovative learning method in the development space. In Q1 and Q2, the project fleshed out partner organizations' training needs regarding everything services and drafted a facilitator's guide for the training sessions. For the rest of FY36, the project will pilot the program, then finalize the facilitator's guide using the pilot results. Project Pact will use the complete program starting in FY37 to help local organizations improve their skillsets to conduct everything.

What makes this reporting good, but not high-quality?

What would you change to improve the text?

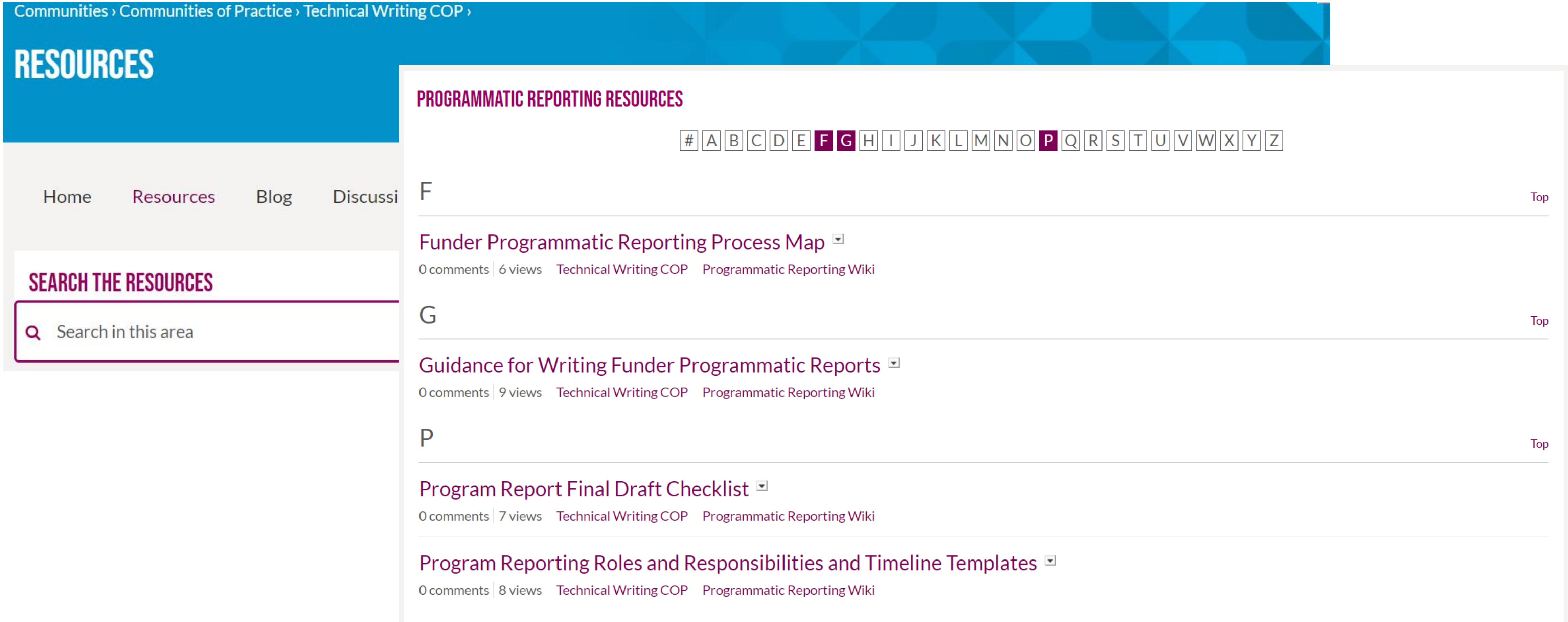
What does quality report writing look like?

Example 3: High-quality report writing

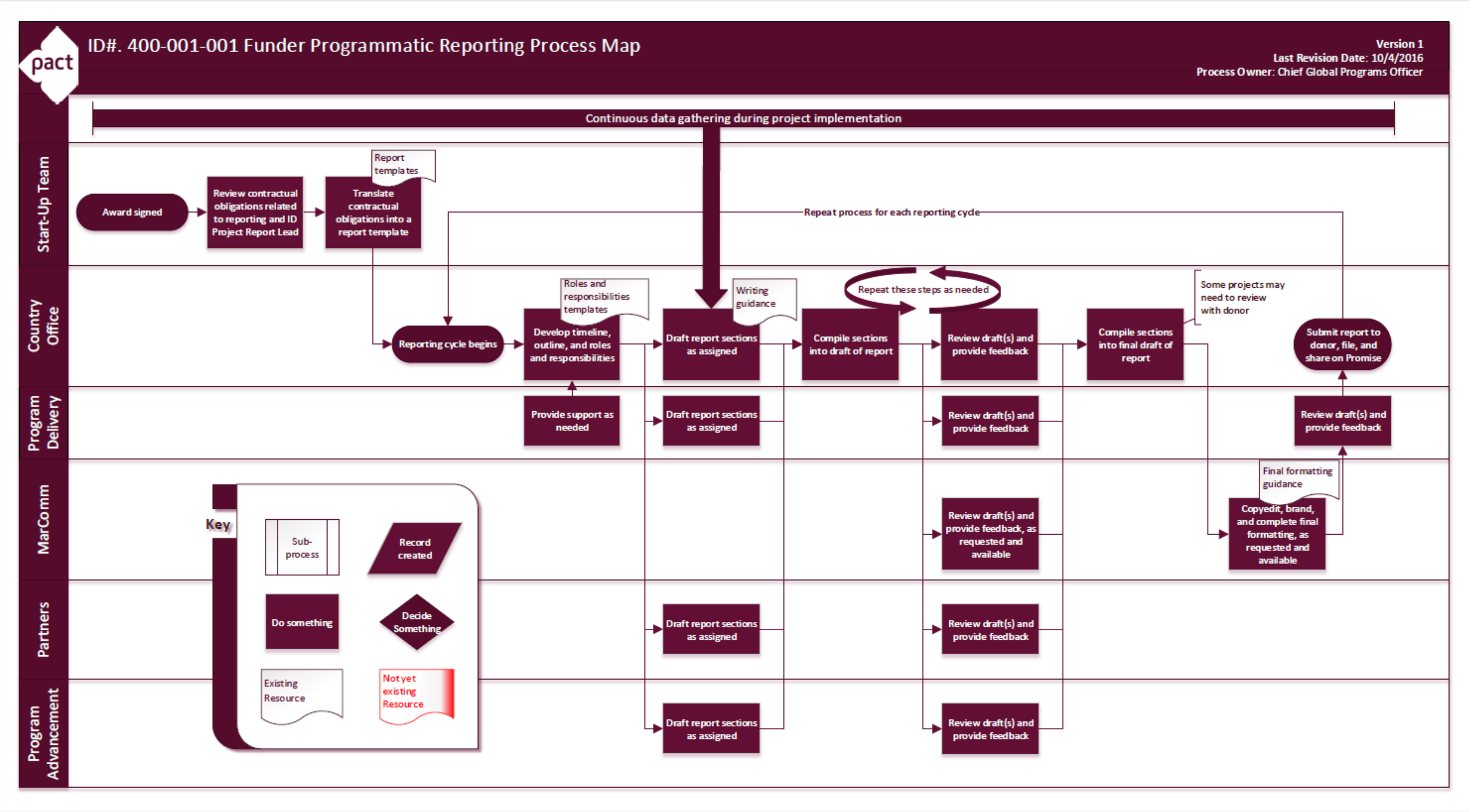
Project Pact is developing a training program, called How to Do Everything. A first in the development space, this new program will help local implementing organizations roll out sustainable everything activities to the communities they serve through a comprehensive, step-by-step e-learning curriculum alongside a skills-based practicum, during which local partner staff mirror Project Pact staff as they execute everything services. Thus far, in FY36, the project mapped local organizations' needs for rolling out strengthened everything services and used the feedback to draft the "Doing Everything" training manual. Next quarter, Project Pact will begin piloting the program, then will use pilot results to finalize the package.

Reporting Resources on Mosaic

https://mosaic.pactworld.org/communities/cops/twcop/resources



Funder Programmatic Reporting Process Map (to be updated)



Program Reporting Roles and Responsibilities and Timelines Templates

pact building local promise.

Program Reporting Roles and Responsibilities and Timeline Templates

Instructions: The Project Report Lead of each award will work with the appropriate project leadership to complete the roles and responsibilities table below and send to all relevant staff at the beginning of each reporting cycle. The roles and responsibilities on the table are illustrative and based on best practices. Projects should update all fields to meet their needs.

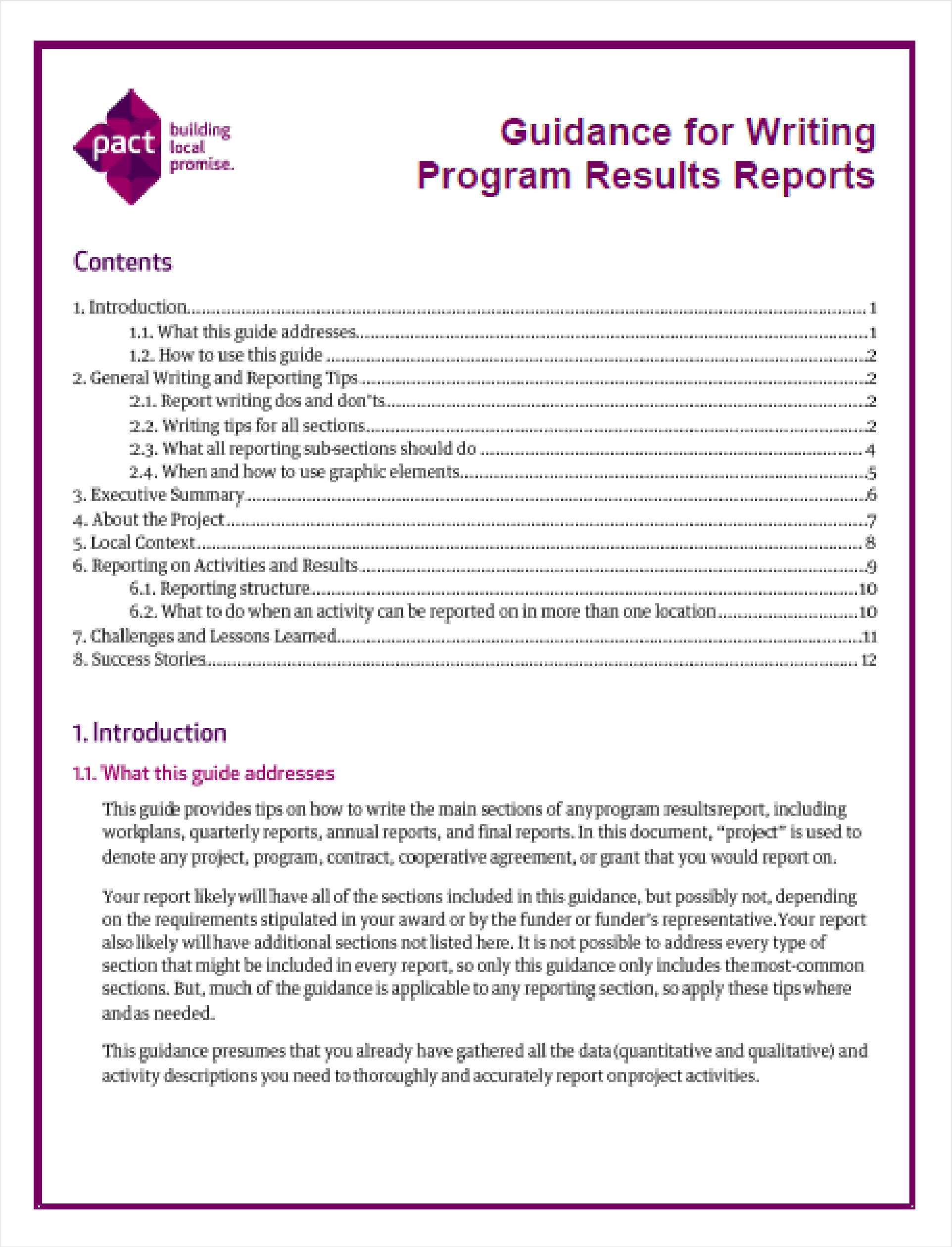
Program Roles and Responsibilities Template

Role	Responsibilities	Who?	Notes
Project Report Lead	• Lead and coordinate all aspects of the reporting process for a project • Combine the contributions of the report writers into one report • Write specific sections as needed • Review the entire report to ensure continuity	[Insert Name]	Should be a country office-based staff member identified during project start-up and built into that staff member's job description. The same staff member should lead all reports.
Project staff [add more rows for project staff as needed]	• Write specific sections (specify which) • Review relevant sections of the report (specify which) • Ensure accurate M&E data is included in the report	[Insert Name]	List individual staff members with specific assignments in separate rows.
Partners [add more rows for partners as needed]	• Write specific sections (specify which) • Review relevant sections of the report (specify which)	[Insert Name]	List partners with specific assignments in separate rows.
Programs impact area backstop	• Write specific sections when project staff are unavailable (with prior notice and agreement) • Review relevant sections of the report and/or the final draft	[Insert Name]	These are the Programs team impact area staff generally based in the Washington, DC office.
Program Operations (PrOps) backstop	• Keep abreast reporting requirements and project progress in creating and compiling the report • Write specific sections when project staff are unavailable (with prior notice and agreement) • Review the report at various stages, when needed • Review the final draft to ensure completeness and compliance • Upload final report to Promise	[Insert Name]	
Chief of Party (COP), Project Director, or equivalent	• Keep abreast reporting requirements • Lead the writing of the executive summary or highlights • Review and approve the entire report prior to submission	[Insert Name]	
Technical editor	• Help create reporting structure and template • Provide final formatting and copyediting support (with prior notice and agreement)	[Insert Name]	This may be your project's communications staff member, the DC-based Editorial Content Manager, or overflow support for these positions. Notify the person at least 3 weeks prior to the date you need them for, and make sure the project budgets in this time and LOE.

Program Reporting Timelines Template

Task	Who?	When?
Update Roles and Responsibilities and Timeline, and send assignments to staff	Project Report Lead [Insert Name]	[Insert Date]
Complete first draft of assigned sections	[Insert Name(s)]	[Insert Date]
Compile and review M&E data	[Insert Name(s)]	[Insert Date]
Compile draft sections and data and send to reviewers with clear guidance about what to review	Project Report Lead [Insert Name]	[Insert Date]
Review sections of report as assigned	[Insert Name(s)]	[Insert Date]
Review comments and update draft as needed	Project Report Lead [Insert Name]	[Insert Date]
[Insert additional reviews as needed]	[Insert Name(s)]	[Insert Date]
Compile final draft of report	Project Report Lead [Insert Name]	[Insert Date]
[Send to funder for review as needed]	[Insert Name(s)]	[Insert Date]
Copy edit and format the final draft	[Insert Name(s)]	[Insert Date]
Review and approve final draft of report	Chief of Party [Insert Name	[Insert Date]
Submit final report to funder	Project Report Lead [Insert Name]	[Insert Date]
Upload final report to the appropriate project page on Promise	PrOps backstop [Insert Name]	[Insert Date]
Upload final report to the appropriate country or project page on Mosaic	Designated Mosaic space manager [Insert Name]	[Insert Date]

Guidance for Writing Program Reports



pact building local promise.

Guidance for Writing Program Results Reports

Contents

1. Introduction

1.1. What this guide addresses

This guide provides tips on how to write the main sections of any program results report, including workplans, quarterly reports, annual reports, and final reports. In this document, "project" is used to denote any project, program, contract, cooperative agreement, or grant that you would report on.

Your report likely will have all of the sections included in this guidance, but possibly not, depending on the requirements stipulated in your award or by the funder or funder's representative. Your report also likely will have additional sections not listed here. It is not possible to address every type of section that might be included in every report, so only this guidance only includes the most-common sections. But, much of the guidance is applicable to any reporting section, so apply these tips where and as needed.

This guidance presumes that you already have gathered all the data (quantitative and qualitative) and activity descriptions you need to thoroughly and accurately report on project activities.

Pact Funder Report Final Checklist

Pact Funder Report Final Checklist

Project name: ______________________ **Reporting lead name:** ______________________

Report type: [choose one]
- ☐ Work plan [specify year: _______]
- ☐ Quarterly [specify year and quarter: ____________]
- ☐ Annual [specify year: _______]
- ☐ Final

Reporting Requirements

- ☐ Reporting meets all requirements specified in the award and by the funder's representative.
- ☐ Reporting includes figures/numbers, not just narrative.
- ☐ Indicator data is accurate and complete.
- ☐ Photo captions accurately reflect the activity captured in the photo.
- ☐ If Pact is the prime, all pertinent partners/sub-awardees are credited as project partners.
- ☐ Correct funding disclaimer included.
- ☐ Funder representative's name and contact information are included.
- ☐ Appropriate Pact contact person's name and information are included.
- ☐ Cover page includes project name, report name, reporting period, funder, award number, and all pertinent logos (funder, Pact, any others required) in correct order.

Writing Style and Editing

- ☐ Narrative text is cleanly written using complete, coherent sentences.
- ☐ All major technical terms are used consistently throughout.
- ☐ All abbreviations and acronyms are defined at first use and included in the abbreviations and acronyms list.
- ☐ If the document uses auto-generated numbers, such as for section headings, activity levels, table/figure titles, the numbers are in numerical order.
- ☐ The document is free from glaring typos.
- ☐ A final spellcheck found no errors.
- ☐ There is no missing or errant punctuation.
- ☐ Above items also are checked in all tables, figures, graphics, photo captions, footnotes, and appendices.

Document Formatting

- ☐ Pact fonts are used throughout: Arial for headings and Georgia for text, unless award requires otherwise.
- ☐ Sections break properly across pages, with no widowed section headings (only the heading at the very bottom of the previous page).
- ☐ All headings are properly tagged with the correct style for their levels.
- ☐ Page numbers are included at the bottom of the page and are in numerical order. Cover, title, and table of contents pages are not numbered.
- ☐ The table of contents is generated and accurately reflects document headings.
- ☐ A header is inserted with the project name, report name, and reporting period.
- ☐ All logos are properly proportioned in size to one another and for their design. No logos are stretched or distorted.

How is reporting going for you?

- Share your own best practices for reporting.
- Ask questions about any pain points you may have.
- Get support from your peers.