CHAPTER 8

REPORTING MONITORING DATA

by Lakshmi Goparaju

It is important to report the progress and results of the project to the staff who implemented the project, those who head your organization, to community members and to the donor. In Chapter 2, we discussed how participatory monitoring allows continuous discussion of project progress and its benefits among CBO/FBO staff and the community. In this chapter, we will focus on how to report monitoring data.

WHY DO DONORS REQUIRE REPORTING?

In all donor-funded projects, the donor who provides the funding asks the recipient CBOs and FBOs to report on their progress and achievements. It's important for us to understand why donors ask for reports. Let's consider an example from every day life.

> Suppose you send a child to school. You buy a uniform, books and school supplies; you may hire a tutor to help your child with homework. The government provides a trained teacher, classroom furniture and a curriculum. Naturally, given all of this investment, you expect your child to learn. The teacher's assessment report of your child's progress is useful to you in terms of deciding whether your investment has been well spent and whether you should invest further in your child's development.

For any activity that we do, we expect a result. Similarly, when donors provide funding and technical support for project activities, they expect measurable results. Reports are a means by which donors follow project implementation. This information also helps the donors in planning future funding and technical support activities. There's a saying that 'information is power.' Monitoring information is power for donor program officers who need to report to their supervisors, who need to report to the head of the agency, who needs to report to either a board of directors or government body.

WHAT TO REPORT?

You should report on the progress of your project-planned activities and their results. As stated elsewhere in the manual, your activities depend upon your objectives. For example, a project objective is to improve the skills of family members caring for people living with AIDS. You will first develop an action plan with details of key activities and expected timeline as to when those activities will be done in order to achieve this objective. Based on this action plan, you will report on the progress of these activities. When the objective is achieved, in this case conducting the skills training, you will report the number of trainings conducted, and the number of people trained disaggregated by gender. If you conducted a pre- and post-test of participants' skills, you should report on those findings as well. In your periodical reports, you will also describe what is going well and what is not going well, and whether you need any technical support. These periodical reports are called ***monitoring reports***.

When the entire project is completed, you will write a brief report describing how the project went, how it was received, the challenges you faced (if any) in implementing the project activities, and, based on the experience of the project, what recommendations you might make for future projects. It's always useful to include a section that discusses lessons learned. This final report is called ***end-of-the-project report***. This report need not be long. For small grants and one-off-event grants, a two page report may be enough; for larger grants, longer reports are usually expected, depending upon the scope of the project.

There are certain minimum requirements in reporting. These are often related to the results of the objectives such as number of training programs conducted, number of people trained, number of people reached with services, number of people reached with messages on prevention, and so on. Depending upon your objectives, you will report on related results.

REPORTING FREQUENCY

The donor determines the project's reporting frequency. Often, the reporting schedule is noted in the agreement between the donor and the recipient. Many donors require a progress report on a quarterly basis, but some may only require a semi-annual reports. As stated above, grantees normally submit a final report at the end of the project.

Sharing information with the community happens on a continuous basis. More formal report backs should be organized according to a frequency that is mutual agreeable to project staff and community members. In principle, communities should receive a copy of the donor report once it is submitted to the donor.

REPORTING FORMAT

Some donors have their own reporting format. Others leave it to grantees to decide upon format. One important issue to negotiate with donors is the choice of language of the report: is it in English or local language? If it's in local language then community members have more ready access to it. On the other hand, it may not be possible for expatriate program officers to read the reports. In either case, it may be necessary to prepare a short summary of the report in a second language so that everyone has access to the information.

In writing the report, you can use pen or pencil or type it up. Your decision depends upon your resources, and what is convenient to you. If your organization is small and you do not have access to typewriters or computers, don't worry about it. Donors are more interested in the information that you send rather than whether it is typed or not.

REPORTING QUANTITATIVE INFORMATION

As discussed earlier in the chapter on indicators, your project indicators could be a combination of both quantitative (numbers) and narrative (qualitative) indicators. Let's first talk about reporting quantitative data. Relatively speaking, it is easier to report numbers: for example, the number of training workshops conducted or the number of people trained. It is also possible to report the number of awareness-raising events held in the community. On the other hand, it may be difficult to report the exact number of people who attended such an awareness-raising meeting. Perhaps 300 to 400 people attended your community awareness-raising meeting; since it's so difficult to count people at large meetings, it's fine to report approximate numbers as long as you are conservative in your estimate.

If your project involves service delivery, that also can be reported in terms of quantitative data. For example, if your project's objective is to provide counseling services to people living with HIV and AIDS, you can report how many HIV+ people received counseling, and of those people, how many of them are men or women. As you're collecting this qualitative data, there may be something important that you learn through observing counseling sessions regarding the needs and concerns of HIV+ people which cannot be reported with a number. That information appears in the report as a narrative description. Such information is called qualitative information.

REPORTING QUALITATIVE INFORMATION

Often, we find that numbers do not describe fully the story that we want to tell. Words are one way to explain what we have seen, heard or learned. Alternatively, you might want to explain certain things through diagrams, since there is a saying that ‘a picture is worth a thousand words.’ If you’ve conducted focus group discussions during the reporting feedback, you should summarize the key points and write a brief discussion on their pertinence to project implementation. All of these examples can be classified as qualitative information. Donors normally encourage you to use both qualitative and quantitative information for your own analysis as well as reporting purposes. Together, they help to tell the story.