REPORT WRITING GUIDE

This guide aims to assist staff with responsibility for compiling and writing program reports. The objective of the guide is to improve the quality and consistency of Mercy Corps' reports to donors by introducing quality standards for content and presentation. It contains helpful tools and tips to make the report writing process easier, and it aims to strengthen the ability of staff to illustrate the results of Mercy Corps' work through project reports.

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Acknowledgements

This guide was developed by the Mercy Corps New Initiatives team, with significant contributions from Shaula Bellour (primary author), Hayden Aaronson, Shannon Alexander, Laura Bruno, Nicole Demestihas, Joe Dickman, Catherine McMahon, Karen Pesjak, Cathy Rothenberger, Gretchen Shanks, Greg Shortreed, Barbara Willet and Blerim Zerkini.

INTRODUCTION

Purpose of Reporting

Reporting is both a management and monitoring tool–tracking progress against objectives, outputs, and activities to inform donors and assess our results. Reports should represent broad consultation with staff and partners as well as beneficiary communities.

Effective reporting demonstrates to **donors** that we are fulfilling our contractual obligations and are able to achieve the results projected in the original project proposal. Reporting also **informs project staff** about project progress and whether activities are being accomplished according to the project plan. Through this process, staff have the opportunity to **critically evaluate** the project and reflect on how implementation is going and what impact it is having. Highlighting any **problems** encountered in project implementation is an important part of this process. In this context, missing a planned target is not viewed as "failure", but rather as an opportunity to capture information, draw conclusions and improve program quality.

At Mercy Corps, reports can have multiple uses and audiences. Aggregated project information and results can be analyzed and used for different purposes within or even after the life of the project. At both the country and agency level, quality project reports may be incorporated into case studies, annual reports, proposals, capacity statements and a wide variety of communications tools.

Effective Reporting

Donors are busy and read many reports in a day. They want to have easily readable reports and communications that leave them with a good understanding of the progress the project is making.

<u>Characteristics of an effective report</u>

1) **Clear and specific**: Information is easy to understand and flows logically; key points are clear.

   ✱Tip: *Highlight key points (in boxes, bullets, bold fonts). Use the "active voice" whenever possible. Avoid being too technical or too general (donors have different levels of tech. understanding). Stay away from jargon and clichés.*

2) **Succinct**: Statements get directly to the point and are informative and not repetitive.

   ✱Tip: *Be concise, use short and simple sentences and avoid using unnecessary words and phrases. Keep it relevant and report only what is central to the project.*

3) **Results-oriented**: Report clearly identifies what has/hasn't been accomplished in regard to planned activities, outputs and objectives.

   ✱Tip: *Ask "how far have the project objectives been reached?" Include explanations of setbacks and reasons for not accomplishing what was planned, identifying ways to deal with constraints or new opportunities.*

4) **Analytical:** Report provides quantifiable data and an analysis of reported activities.

   ✱Tip: *Aggregate, summarize, mention trends or patterns, point to exceptions, and prioritize issues according to magnitude and need for attention.*

5) Good use of **graphics**: Report uses tables, photos and charts to display information, break up text, and present large amounts of data in a small space.

   ✱Tip: *Aim for balance between narrative and other graphic displays (at least one graphic every few pages). Use sufficient white space and a visually attractive layout.*

PART I: REPORTING PROCESS

Report writing is an integral part of our work and it's essential to build this process into project workplans—budgeting time for information gathering as well as report writing and review.

Step 1: Report Preparation

Step 1: Preparation

- Refer to the project reporting schedule and create a workplan that includes adequate time for preparation, writing and review (both locally and at HQ)
- Inform relevant HQ parties of anticipated date for submitting draft report for review or any other anticipated inputs needed from HQ (such as content-related information or assistance with co-writing)
- Collect and analyze project information from monitoring records; reports, field visit notes, M&E system data, interviews with staff/beneficiaries
- Review donor reporting guidelines and familiarize yourself with donor interests and motivations for funding the program
- Read the last donor report submitted to:
  - ✓ Identify information that was promised to be included in the current report
  - ✓ Understand the donor's last perspective of the program's progress
  - ✓ Recall any changes in implementation strategy or operational situation that should be informed or explained to the donor
  - ✓ Familiarize yourself with format, structure, and organization of information
- If there is no previous report, refer to reporting template provided by donor and/or MC
- Read any feedback the donor provided on the last report

Step 2: Report Writing

Step 2: Writing

- Utilize the last report as the starting point to guide writing of the current report:
  - ✓ Incorporate new information into the flow and organization of the previous report; avoid reorganizing the report content or changing categories or headers (unless the format is changed by the donor or the previous format was poorly designed).
  - ✓ Delete old content as you write the new report.

- Make sure to report only on activities carried out during the current reporting period; do not include more recent information outside of the reporting period.
- Address all program indicators; pull updated data from M&E database if available.
- Focus on measurability: put data in context.
- Cross-check the report with the proposal workplan, logframe and the relevant financial report; make sure all budget figures match!

<u>Bad example</u>: *"100 community members attended the PRA exercise"*

<u>Good example</u>: *"100 community members* ***in a community of 500 households (or 20% of the population)*** *attended the participatory rural appraisal (PRA) exercise"*

- Avoid "fluffy" language such as "everything was wonderful and all participants were happy"; instead give concrete information such as "20 participants were very satisfied with the training, as indicated by a score of 5 on a scale of 1 to 5, when surveyed."
- Write reports in past tense when describing what has already been delivered, write in present tense for ongoing activities that are not yet complete, and write in future tense only for activities that are yet to be carried out. Final reports should be written in past tense!

Examples: "Mercy Corps ***provided*** *2 latrines to each of 10 schools last quarter", vs. "Mercy Corps is currently* ***constructing*** *2 latrines at each of 10 schools", vs. "Mercy Corps* ***will construct*** *2 latrines at each of 10 schools in the next quarter."*

- Tone should be formal: avoid informal terminology such as "we/our/their/MC"
- Focus on audience: make sure information given is at the appropriate level of detail for a donor audience.

<u>Bad Example</u>: *"In our Community A, 15 community members attended our training. Two were unable to attend due to a death in the family. In Community B, 25 members attended despite rainy weather which made their transportation difficult. In Community C, 30 people came to our training and all said they were very pleased with MC facilitation methods."*

<u>Good Example</u>: *"Seventy participants from Communities A, B and C attended the Mercy Corps Village Development Plan training (roughly 20% of eligible households). Mercy Corps surveyed training participants and found that 90% were highly satisfied with Mercy Corps facilitation methods.*

- Tailor presentation of information to donor interests/objectives/motivations. For example, in Sri Lanka, AusAID is primarily interested in reducing conflict. Mercy Corps' reports for AusAID should therefore focus or highlight conflict mitigation components of the program. Another donor, for example, might be interested in how projects improve livelihoods of tsunami affected families. Keep the donor audience in mind when writing reports.

Step 3: Report Review

Report review checklist

<u>Upon completing a report, print out a near-final draft and check the following:</u>

- ❒ Relevant reporting guidelines followed correctly and any donor correspondence checked
- ❒ Report is consistent with previous reports and report plans
- ❒ Structure is correct, with no repetition

- ❒ Cover page includes: 1) report period 2) report date 3) correct project name, 4) funder, 5) Mercy Corps logo, 6) Mercy Corps contact information
- ❒ Table of contents: 1) all sections listed and formatted 2) page numbers correct
- ❒ If relevant, list of abbreviations, tables and appendices included and accurate
- ❒ Consistent font used throughout, margins are uniform
- ❒ Spelling (spell check)
- ❒ Headings consistently formatted
- ❒ At least one photo is included (with explanatory caption)
- ❒ All tables are correctly labelled and tally with the table of tables.
- ❒ All external sources are identified (footnote with document, source, date, page)
- ❒ Spacing is single and pages are numbered
- ❒ Map of the area is included (if relevant)
- ❒ Tables: 1) correctly labeled, numbered and centrally aligned 2) totals correct 3) text properly aligned
- ❒ Appendices included in order of reference and are well formatted
- ❒ Check all math: if statistics are used, make sure they add up correctly
- ❒ Final draft proofread again – hard and soft copies are the same.

Formatting – make sure that:

- ❒ Formatting is consistent throughout
- ❒ FONT TYPE, font size and color of text are the same throughout
- ❒ Bullets, numbers and Roman numerals are consistent (use the same bullets throughout the report and consecutive numbering)
- ❒ Section headers and indentations are consistent and accurate
- ❒ Page numbers included in the footer
- ❒ Report is branded according to Mercy Corps formats (include logo or Mercy Corps identifier in header or footer on each page)
- ❒ Photos are compressed before inserting into the document to reduce file size
- ❒ Tables and charts used as visual aids to present large amounts of quantitative data, or lists of projects by geographic location, etc. Ensure proper centering and text wrapping around tables throughout document.
- ❒ Annexes formatted consistent with the narrative report. Each annex attached should have consistent labels and titles.

Editing

- ❒ Make sure all abovementioned writing and formatting points are addressed in the report.
- ❒ Create a filename that includes the donor name, program title, type of report (quarterly, annual, interim, etc.), name of author, and is labeled as 'draft'. The second editor to the same report should make a copy of the draft and re-title the document to include their name or initials.
- ❒ All changes made to drafts should utilize the "track change" tool in MS Word or a different font color to ease incorporation of all changes for the next editor.

✱**Tip:** To set up a **table of contents,** see the Quick Reference guide on the Digital Library: *Word 2003: Creating a Table of Contents*

Step 4: Report Submission

Step 4: Submission
- Coordinate submission with finance to make sure financial and narrative reports are submitted at the same time, and are consistent with each other.
- Double check donor protocol: does this report need to be submitted by:
  - ✓ HQ Program Officer in Portland, Edinburgh, or Hong Kong?
  - ✓ Country Director or Deputy Director?
  - ✓ Resource Development department at HQ?
- Make sure correct individuals are copied on email submission of report; all donor contacts (both in country and at headquarters) as well as relevant MC Program Officers and Finance Officers.

After submission:
- Circulate submitted report to all contributing authors.
- Contributing authors should re-read final report submission to learn and reflect on their contributions in order to improve future report writing. Additionally, alert team of any unintended mistakes included in the final report.
- Email field offices and contributing authors any donor feedback on the report.
- Submit electronic version of the report to the Mercy Corps Digital Library.
- Make sure the report is filed properly (shared drive, paper files, etc.).

PART II: REPORT CONTENT

All reports submitted to donors, HQ and others should clearly reflect performance against project objectives, analysis of the results and plans for next steps. Reports should meet the standards of Mercy Corps' principles for good monitoring and should be based on logframe objectives and workplan targets. Project reports should clearly communicate the following key elements:
- ✓ Expected and actual results
- ✓ Reasons for missing targets (where applicable)
- ✓ An outline of "next steps" based on the analysis of results

Reports should be written so that they are understandable to external audiences. This includes possible readers that may be both unfamiliar with the details of the program and the particular country context in which the program occurs. To ensure this you may want to ask someone outside of the specific program to review the document for clarity of content.

Sample Reporting Format

Most donors have their own format that should be adhered to, however, the template below can be used to guide this process and can be used for reporting to donors without a set format.

Cover Page

<u>Include the following</u>:
Mercy Corps logo
Project title

Type of report
Geographic location
Grant amount
Reporting period
Donor
Mercy Corps contact details (HQ and field)
Photo, if appropriate

Abbreviations/Acronyms
List in alphabetical order, with all abbreviations/acronyms contained in the report. ✱Tip: format by using a table with invisible border.

Table of Contents

I. Executive Summary

The summary should be a synopsis of the report that highlights the main events of the reporting period. The executive summary should be written after the main report has been completed.

II. Program Overview

- Project goal
- Summary of project, intervention context and current situation
- Changes in program environment

III. Performance Summary -- Monitoring and Evaluation

A. Objective 1 [repeat for all objectives]

- Activities planned and accomplished
- Results/Outputs achieved (including level of success and reasons)
- Progress against indicators

✱**Tip**: When showing project outputs, always illustrate the cumulative effects – ie. how many farmers were trained in this reporting period? What is the total number of farmers trained in the program? What proportion is this of the village? This information can be presented in a table, yet it should still be discussed in the narrative text.

B. Process – Methodology

- Describe the monitoring and evaluation methods used to measure results
- If project is primarily monitored by partner organization(s), describe Mercy Corps' oversight of this process

✱**Tip: Performance summary data** can be easily captured in a table, with narrative explanation. For an example, see *USAID/OFDA Quarterly Report Template by Mercy Corps* in Annex 1 of this document.

IV. Management and Administration

Describe how the project team is organized and managed. If the staffing structure has changed from the proposal, explanation should be provided. Information about project partners can also be included here.

V. Challenges and Lessons Learned

Lessons refer to organizational lessons. If something is working it should be noted with plans to repeat the exercise. If there are failures, they should be highlighted and practices should be modified so as to achieve better results.

VI. Conclusions

The conclusion should briefly sum up the report. It should not contain any new information, but provide an assessment of the direction of the project. Briefly sum up the future plans of the program.

VII. Success Stories

See instructions below.

Success Stories and Beneficiary Profiles

A well-written success story can be a powerful tool. Success stories that are tied to desired results (both qualitative and quantitative) have the potential to provide a compelling answer to the "so what?" question. As part of a report, these profiles are not just an add-on, but instead a valuable way to assess, refine and improve programs.

Story Components

1. Headline
Good headlines or titles are simple, jargon-free, and have impact; they summarize the story in a nutshell; and include action verbs that bring the story to life. An effective headline should include few words.

2. Photograph
The photograph will bring the story to life. The photo should be colorful, depict action, capture people's attention, and feature a main character prominently. The photograph showcases the person in context.

3. Narrative text
Narrative text should vividly explain the person's story based on a first person account, interview or testimonial. The most important element of these stories is simple: How did Mercy Corps help this person and his/her family? This is our chance to explain the societal impact of our programs through individual lives. What changed for the person or community? What was learned? What was received? What was the end result? How did this make a difference in the community or country overall?

Begin by providing background information about the beneficiary, illustrating the problems and/or challenges faced by the individual or community. Then describe the assistance provided by Mercy Corps and the outcome and impact of this assistance. Provide some programmatic context around the interventions (why the activity took place, for what objective) and include some analysis of the situation (why the intervention was successful, what other influences or activities were important). Be careful not to over-dramatize or overstate the impact of our work, ie. the new well will transform people's lives, the improved school will ensure that all children will learn to read and write. Keep stories grounded in reality.

Guiding questions:

- Names, ages, occupations of family members.
- Description of life before Mercy Corps arrived.
- Reason for Mercy Corps intervention. Was there a natural disaster, conflict, war or other emergency situation?
- How did the Mercy Corps program get started?
- How did the participant or family find out about Mercy Corps?
- How are they involved in Mercy Corps' programs now?
- What new skills, material goods, or loans have they received as result of Mercy Corps programs?
- How has Mercy Corps made their lives better?
- Does the family have more land, livestock, a new job/profession, etc. as a result of this program? Do they grow more food, earn more money, etc.? Numbers (even estimates) are helpful here.
- Has housing, education, clothing, health care improved? How?
- How will the program have a lasting impact? How has daily life already changed?
- What more could Mercy Corps do for them?
- What do the participants themselves see as the issues their community now faces?
- How do they see Mercy Corps' role in assisting them to tackle these issues?

4. Pullout Quote

Provide a brief beneficiary quote that represents and summarizes the story and clearly states how Mercy Corps helped the individual or community. This quote should capture the success of the program and will be highlighted in the piece. Supportive quotes from project and partner staff, local partners, community groups and project staff can be valuable additions.

PART III: STYLE & PRESENTATION TIPS

General writing tips

- Spell out **acronyms** (e.g. UNDP) the first time used, followed by the acronym in brackets/parentheses. These should usually be listed at the beginning of the report.

- When writing reports for US donors, use **US English**. When writing for European donors, use **UK English** (e.g. organize vs. organise, program vs. programme etc).

- In narrative text, spell out numbers **one through nine** and use numerals for **10 and above**. When a number comes at the beginning of a sentence it should be spelled out. *Examples: two students, 11 schools, one training, 20,000 beneficiaries.*

- Use **italics** when referring to books or reports and foreign or botanical words.

- Convert money into **donor currency**, and be consistent with abbreviation. Provide exchange rates.

- Only use **capital letters** in text for proper nouns (e.g. names, places etc). Titles are generally <u>lowercase</u> unless they are used in conjunction with a name. For example: the minister, the Ministry of Education, Minister Odago, and the government of Uganda (not Government).

- Write out words in full and **avoid contractions** (e.g., was not instead of wasn't).

- Use **non-sexist language** and gender-sensitive wording (e.g. use spokesperson instead of spokesman, and gender-neutral pronouns where appropriate).

- Material borrowed or adapted from external sources must be identified (footnote with document, source, date, page).

Punctuation Tips:

- When describing a range use '–' e.g. *1995 – 2000*, or *January – March*.

- When mentioning **dates**, always be specific – not *this year,* but *in 2007,* no*t last month* but *January 2007*.

- When using the **full date** (month, day, and year) in text, separate the year with commas. For example: *On September 30, 2006, Mercy Corps will hold a training event.* Do not use commas when only the **month** and **year** are given. For example: *The project began in May 2005*. In reports to European donors, dates should read Tuesday, 27 April 2007.

- Always spell the world "percent" when outside of parentheses, e.g. *"…an increase of 2.5 percent…"* however, use the symbol "%" within parentheses, e.g. *"…nearly two-thirds (67%) of respondents…"*

- Use a serial comma when listing two or more items, i.e., use a comma before the word "and" or "or" when you are listing more than two items. For example: *The organization produced manuals, guidelines, and books about HIV/AIDS*.

- Always place **periods** and **commas** inside quotation marks.

- Use **apostrophes** for possessives (*project's workplan*), but not for plurals. For example: *1990s*, *NGOs*.

- Write millions and billions in full: *$25 million*.

Improving Writing Clarity

Short Sentences

To improve readability, keep sentences short. Long, complex sentences are more difficult to read than short, simple sentences. It's important to vary the length of your sentences, but unnecessarily long sentences should be shortened. A good rule of thumb is to keep your average sentence length to 20 words or fewer to improve the readability of your writing.

Clear Paragraph Structure

<u>Begin each paragraph with a topic sentence:</u>

- *What is the topic sentence?* The topic sentence is the first sentence in a paragraph.
- *What does it do?* It introduces the main idea of the paragraph.
- *How do I write one?* Summarize the main idea of your paragraph.

Follow with supporting sentences:

- *What are supporting sentences?* They come after the topic sentence, making up the body of a paragraph.
- *What do they do?* They give details to develop and support the main idea of the paragraph.
- *How do I write them?* Provide supporting facts, details, and examples.

Finish with a closing sentence:

- *What is the closing sentence?* The closing sentence is the last sentence in a paragraph.
- *What does it do?* It restates the main idea of your paragraph.
- *How do I write one?* Restate the main idea of the paragraph using different words.

Active Voice

Sentences can be written or spoken in the active or passive voice. In an active sentence, the subject is doing the action, for example: ***Mercy Corps conducted the assessment***. Mercy Corps is the subject and is carrying out the action. In passive voice the target of the action gets promoted to the subject position: ***The assessment was conducted by Mercy Corps***. The subject of the sentence becomes the *assessment*, but the *assessment* isn't doing anything.

Passive sentences often lead to obscured meaning by leaving out the agent doing the action, for example: ***Peer educators were selected***. Here, the reader doesn't know who selected the peer educators. If you know who did what, it's better to use an active sentence in most cases. Though passive voice can have specific uses, active voice helps to create clear and direct sentences and uses fewer words to convey the same message. Try to write in active voice sentences to make your writing more clear and concise.

Common passive construction in Mercy Corps reports

From Passive to Active: Adding the subject of the action

The partnership agreement was signed. → *Mercy Corps and local partner x signed the agreement.*

A workshop was organized in Niamey...

Assessment tools were developed...

The role of civil society was discussed...

Civil society organizations were identified…

Organizing and Presenting Information

Well-presented information gives the impression of professionalism and helps to keep readers' attention. Effective reports utilize a clear structure and a variety of visual presentations.

Headings

- Use headings to signal topic changes. Specific headings are usually more helpful to readers than general headings. Be sure to use parallel verb tense ("Identifying…", "Demonstrating…")

- Visually differentiate heading levels so that readers can see the difference within a document. Including too many headings or too many headings levels can be worse than including none at all.
- Make the structure of the report clear by including more space before headings than after headings and by differentiating the headings typographically.

Serif Fonts and White Space

- Use an eye-friendly font and ample white space between blocks of text. Choose a clean serif typeface, like Times New Roman or Arial, for printed documents.

Bullet and Numbered Lists

- Put important points in a numbered or bulleted list and look for opportunities to reformat any series in text to a bullet or numbered list. Lists make it easier for readers to quickly absorb a series of items or phrases that might otherwise be difficult to follow.
- ✱Tip: If you are having problems in aligning columns of bullets, insert a table without borders

Text Boxes

- Text boxes can be used to present information in a clear and succinct way by highlighting key points, breaking up prose and making the report more visually interesting to the reader.

Displaying Information with Tables and Graphics

Tables and graphics help maintain reader interest and can express data and ideas that might otherwise be difficult with text. Plan your tables and graphics early in the writing process when you're organizing all of your raw data. That way you'll have an idea of the effort required to create the nontext elements of your report and be able to write the appropriate framework for these elements into the text.

<u>Tables</u>

- Tables are useful for organizing and capturing information. Often, data and analytical results can best be presented in tables, allowing for a quick comparison of figures. Be sure to keep these summary tables simple. Often it is easier to digest and make sense of the data if it is broken down into multiple, small tables rather than large summary tables.
- ✱Tip: See *DM&E Tip Sheet #11: Data Analysis* for further tips on presenting data.

<u>Graphics</u>

- Use graphs and charts whenever possible–centered and with titles in bold, labelling them as Figures throughout the report. Graphs can be particularly useful in showing trends over time. Always add a few sentences in the text to incorporate and describe the graph.

> **✱Tip:** For **table instructions** and troubleshooting, see the Quick Reference guide on the Digital Library: *Word 2003: Tables: Tips and Tricks*

Using Images in Reports

Often the best way to tell a story is with a powerful image and good caption. Photos can provide evidence of impact, adding texture and context to narrative descriptions. Be sure to compress all photos used in reports or other communications.

Tips when using images:

- Include "who, what, when, where, and why" of photos in captions
- Whenever possible, show people looking at camera, to connect emotionally with readers
- Select images that are in focus and that are colorful and bright
- Show the "brand" in context (Mercy Corps or donor)
- Photos of beneficiaries, especially youth, with donated product
- Photos emotionally connecting donor to beneficiary communities and individuals
- Photos that indicate the location and culture of beneficiaries
- Link photo with corresponding text
- Good pictures have a clear subject. Cropping images makes them more dramatic and eliminates distracting backgrounds that may not be relevant.
- Before and after photos: two photos taken of the same place, but at different times is one of the best ways to demonstrate the impact of Mercy Corps' work.

Before photo captures the conditions before Mercy Corps' involvement

After shows how the same situation has improved with Mercy Corps' assistance

What to avoid:

- Avoid overuse of photos of panel discussions, meetings, and conferences, especially when the focus is not on participants
- Avoid photos in which the activity is unclear, where no emotion is displayed, or the individuals are merely standing in front of a sign
- Avoid stagnant shots of buildings

Tip: For instructions on **using and compressing photos**, see the Quick Reference guide on the Digital Library: *Office 2003 Picture Manager - Tips and Tricks*

Reporting Resources

The Elements of Style, William Strunk Jr.
http://www.bartleby.com/141/

Purdue Online Writing Lab
http://owl.english.purdue.edu/

ANNEX 1: USAID/OFDA Quarterly Report Template

FIRST QUARTERLY REPORT

MONTH – MONTH 2007

Title of Project

Funded by USAID / Office of Foreign Disaster Assistance (OFDA)

Photo Instructions:

- Insert picture from file
- Right click on photo and select Format Object to alter size, borders (weight: 1-1.5) and layout (square)
- Select Compress Picture from photo toolbar to reduce size
- Insert text box for the caption
- Group caption with photo by selecting both (shift+left click), right click and select grouping

Note: For Office 2003 instructions see Digital Library: *Quick Reference: Office 2003 Picture Manager*

Insert caption describing photo

COUNTRY CONTACT	HEADQUARTERS CONTACT	PROJECT SUMMARY	
Name	Name	Award No.	
Country Director	Title	Start Date	
Street	3015 SW First Avenue	End Date	
City, Country	Portland, Oregon, USA	Report Date	
Phone	Phone: +1(503) 796-6800	Total Award	
Fax	Fax: +1 (503) 796-6844		
Email	Email		

Note: Keep reports succinct and relevant—aim for 5-10 pages. All reports should conform to the requirements of the original grant agreement and include any special reporting provisions. The format may be adapted to reflect specific OFDA country-level requests or priorities.

Executive Summary

***Instructions*:** **Provide an update on the** current operating environment**, highlighting:**

- Changes in the humanitarian, political or security situation
- Key issues, problems and opportunities

Provide a summary of **major accomplishments / challenges** during the quarter.

Program Overview

Instructions: Provide a brief summary of the **program goal**, **intervention context**, and **beneficiary population** (1-2 paragraphs). This information may not change from quarter to quarter, but should provide enough context to allow the report to stand alone.

Performance Summary

SECTOR #1 List SECTOR	List objective				
Beneficiaries Targeted	0 IDPs:		Budget	$0	
Beneficiaries Reached	0 IDPs:	0% 0%	Amount Spent	$0	0%
Geographic Area (s)	Province/District/Town				
Sub-Sector:					
INDICATORS	BASELINE		TARGET	PROGRESS (date)	
List indicators	*Enter N/A if no baseline*				
Sub-Sector:					

Instructions: Complete a separate table (with narrative underneath) for each sector. Provide target numbers based on original proposal, deriving actual numbers from monitoring outcomes (divide the actual number by the target number to determine the percentage rate of progress). Table headings are based on newest OFDA proposal guidelines; some data may not be relevant for projects approved prior to December 2006 (ie., sub-sector indicator categories). Next to PROGRESS, insert the last day of the reporting period. Delete any rows that do not apply. Provision of budget information is optional, though recommended.

Sector Summary

Instructions: Summarize progress during reporting period—by *sub-sector* (or by *activity/ location* for grants pre-December), including:

- **Relevant data** for reporting period, ie. number of beneficiaries served, total amounts distributed, project costs (numbers in bold or summarized in table format)
- Demographic profile of targeted/reached **beneficiaries**
- Analysis of **monitoring results** and reflections on **progress against indicators**

- Narrative details on factors contributing to **success** or **challenges**
- Any **changes** made to project targets, implementation plans or type of activities
- **Photos** of activities, beneficiaries, rehabilitation projects "before & after"
- **Future activities** related to meeting sector objectives

Cross-cutting Themes

Name of Cross-Cutting Theme List CCT (A)	Relevant Sector and Sub Sector			
INDICATORS	BASELINE	TARGET	PROGRESS (date)	
List indicators (A)	*Enter N/A if no baseline*			
Name of Cross-Cutting Theme List CCT (B)	Relevant Sector and Sub Sector			
INDICATORS	BASELINE	TARGET	PROGRESS (date)	
List indicators (B)	*Enter N/A if no baseline*			

Instructions: Complete table above if original proposal was submitted after December 2006. Provide narrative details on cross-cutting themes: describe progress related to CCT and relevant project components.

Monitoring and Evaluation

Instructions:

- Describe the monitoring and evaluation method and data used to measure results
- If project is primarily monitored by partner organization(s), describe Mercy Corps' oversight of this process

Coordination

Instructions: Provide program and sector-level details on coordination and information-sharing with other agencies (UN, NGOs, other USG agencies, donors, local groups, local and national government agencies), including:

- Coordination mechanisms and method of **information gathering** and **dissemination**
- Activities of **other agencies** working in the same sector and how Mercy Corps is coordinating efforts
- Effectiveness of **inter-agency coordination** and the role played by Mercy Corps

Conclusion

Instructions: Summarize progress to date. Highlight lessons learned and report on any project concerns or adjustments as a result of changes in operating environment or other challenges.

Success Story

See Digital Library: *Helpful Hints for Composing Beneficiary and Staff Success Stories*

Annexes: Indicator plan, training summaries, activity/distribution lists, media clippings

ANNEX 2: Report Review Checklist

Upon completing a report, print out a near-final draft and check the following:

- ❐ Relevant reporting guidelines followed correctly and any donor correspondence checked
- ❐ Report is consistent with previous reports and report plans
- ❐ Structure is correct, with no repetition
- ❐ Cover page includes: 1) report period 2) report date 3) correct project name, 4) funder, 5) Mercy Corps logo, 6) Mercy Corps contact information
- ❐ Table of contents: 1) all sections listed and formatted 2) page numbers correct
- ❐ If relevant, list of abbreviations, tables and appendices included and accurate
- ❐ Consistent font used throughout, margins are uniform
- ❐ Spelling (spell check)
- ❐ Headings consistently formatted
- ❐ At least one photo is included (with explanatory caption)
- ❐ All tables are correctly labelled and tally with the table of tables.
- ❐ All external sources are identified (footnote with document, source, date, page)
- ❐ Spacing is single and pages are numbered
- ❐ Map of the area is included (if relevant)
- ❐ Tables: 1) correctly labeled, numbered and centrally aligned 2) totals correct 3) text properly aligned
- ❐ Appendices included in order of reference and are well formatted
- ❐ Check all math: if statistics are used, make sure they add up correctly
- ❐ Final draft proofread again – hard and soft copies are the same.

Formatting – make sure that:

- ❐ Formatting is consistent throughout
- ❐ Font type, font size and color of text are the same throughout
- ❐ Bullets, numbers and Roman numerals are consistent (use the same bullets throughout the report and consecutive numbering)
- ❐ Section headers and indentations are consistent and accurate
- ❐ Page numbers included in the footer
- ❐ Report is branded according to Mercy Corps formats (include logo or Mercy Corps identifier in header or footer on each page)
- ❐ Photos are compressed before inserting into the document to reduce file size
- ❐ Tables and charts used as visual aids to present large amounts of quantitative data, or lists of projects by geographic location, etc. Ensure proper centering and text wrapping around tables throughout document.
- ❐ Annexes formatted consistent with the narrative report. Each annex attached should have consistent labels and titles.

Editing

- ❐ Make sure all abovementioned writing and formatting points are addressed in the report.
- ❐ Create a filename that includes the donor name, program title, type of report (quarterly, annual, interim, etc.), name of author, and is labeled as 'draft'. The second editor to the same report should make a copy of the draft and re-title the document to include their name or initials.
- ❐ All changes made to drafts should utilize the "track change" tool in MS Word or a different font color to ease incorporation of all changes for the next editor.