PROJECT REPORTS ENGAGING THE DONOR: Highlighting important learning moments and accomplishments

Why is this important?

- 1. Results and lessons learned are clearly communicated to the client
- 2. Well-organized reports reflect well on the p oject
- 3. Can facilitate a better dialogue between client and implementing partner
- 4. Can create a better dialogue moving forward



Know your audience

Spend time at the beginning of the project talking to your donor and check in periodically to elicit feedback

- 1. What do they want to see in your project reports?
- 2. What information can you include in your report to make their jobs easier?
- 3. How can you make it easier for them to pull out the key data that they need?



Do your research

- 1. What are other projects in country doing?
- 2. Look for some examples of reports/visuals that fi what your donor is looking for

A QUICK ONLINE SEARCH MAY HELP YOU FIND SOME EXAMPLE



Best practice checklist

More visuals

Easy to understand charts/graphs

Highlight top indicators and learning moments



Use templates to ensure consistency among reports

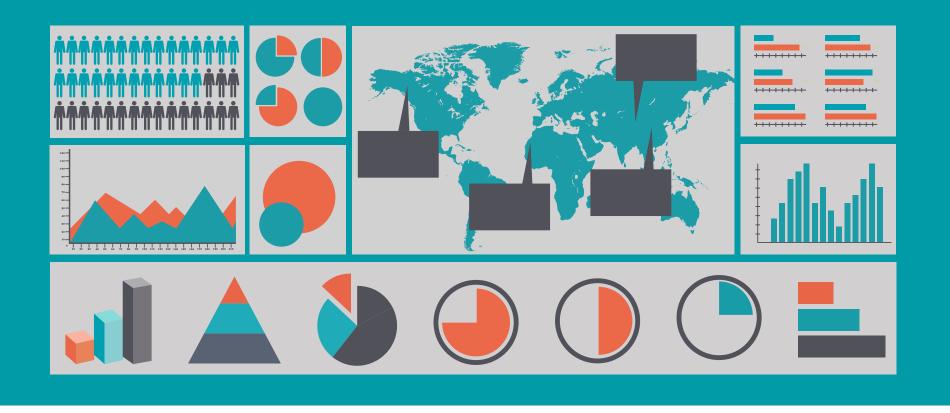


Use executive summaries to highlight achievements



Keep file size dow

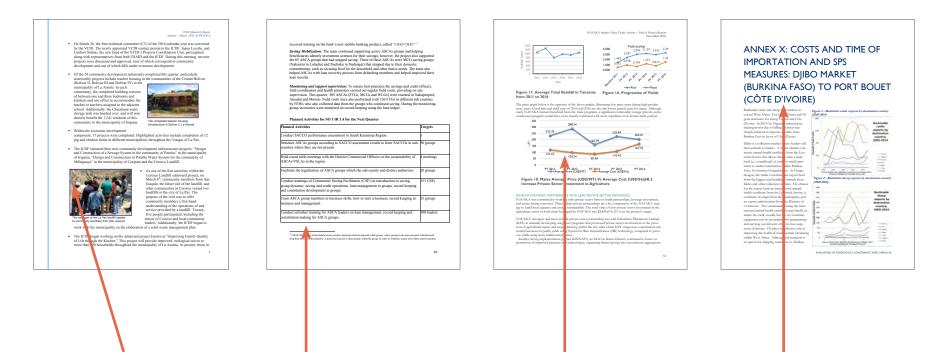
Consider bringing on a graphic designer



VISUALS

Visual don'ts

- 1. Don't squeeze the visual into a small space, make sure any text is large enough to read
- 2. Don't use hard to read typefaces for charts/graph (sans serifs like Calibri, Arial, Verdana work best)
- 3. Don't include too much information in one visual
- 4. Don't use effects like drop shadow or borders that are distracting



DONT DO MUCH TO HELP BREAK UP TEXT

TOO SMALL PHOTOS A LOT OF TEXT- CHART COULD USE SOME COLOR

DATA IS SMALL AND DIFFICULT TO FOL OW+ DROP SHADOW ISNT WORKING

HEADLINE TAKES UP TOO MUCH SPACE WHICH IS NEEDED FOR VISUALS

Visual do's

- 1. Simplify visuals with easy to understand information
- 2. Pull out key data and information by using color, shapes, icons and larger text
- 3. Keep the layout clean and uncluttered
- 4. Allow enough space between the visuals and text so that it doesn't look crowded
- 5. Create hierarchy of headings with consistent styles
- 6. Use less text when a visual can say it better



USE OF I(ONS + CLEAN DESIGN

NICE WHITE EXECUTIVE SUMMARY

GREAT WAY TO SPA(E + USES AN INCORPORATE A PHOTO AND PULL OUT INFORMATION

EMPHASIZE THE NUMBERS

Use color

- 1. Use color purposefully to highlight most important data
- 2. Use color sparingly and avoid color overload
- 3. Use color to highlight your data, text, titles or pull quotes
- 4. Use your organization's brand colors











Use photography

- 1. Use a strong photo on your cover
- 2. Add interest with photos that support your information
- 3. Do not use blurry, dark photos
- 4. Do not distort photos, resize proportionately
- 5. Use photos to break up large amounts of text
- 6. Keep photos and text balanced











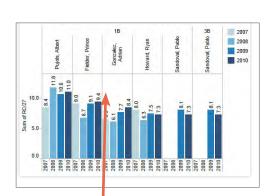
Presenting data

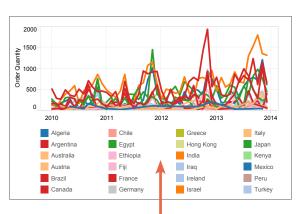
- 1. A visualization should clarify and summarize the data
- 2. When you want to show a location or geographical data, use a map!
- 3. Limit the number of colors and shapes in a single view
- 4. Clearly explain the data in its title or surrounding text
- 5. Label your visualization in the right places

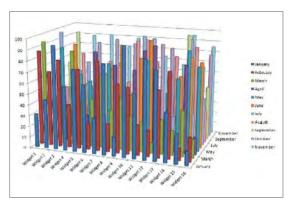
(AN YOU UNDERSTAND THE VISUALIZATION IN 30 SECONDS OR LESS, WITHOUT ADDITIONAL INFORMATION?

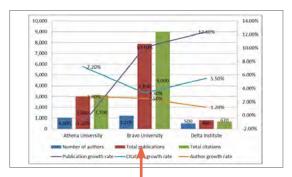


Data don'ts







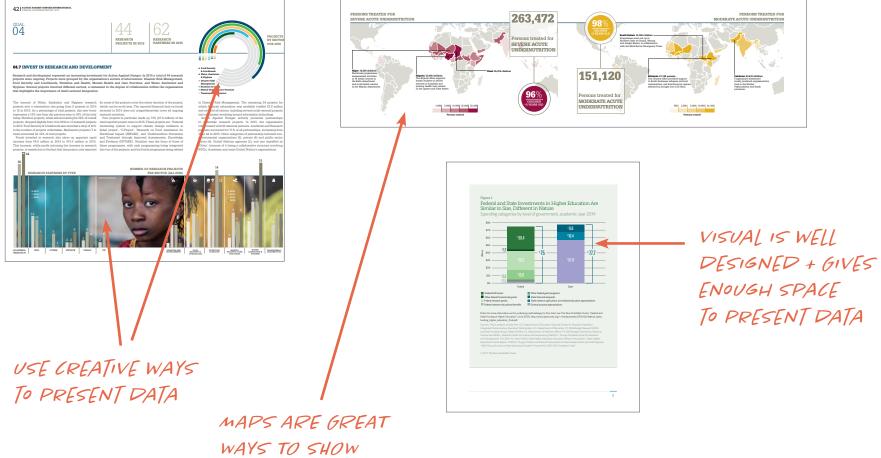


TOO MANY COLORS AND VALUES

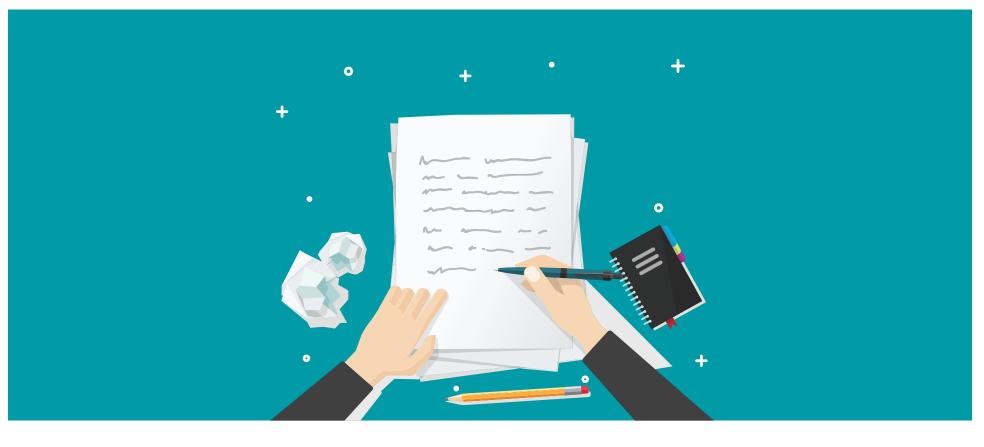
DONT USE VERTICAL TEXT, IT'S HARD TO READ

> Too MANY VARIABLES IN THESE VISUALIZATIONS

Data do's



GEOGRAPHI(AL DATA



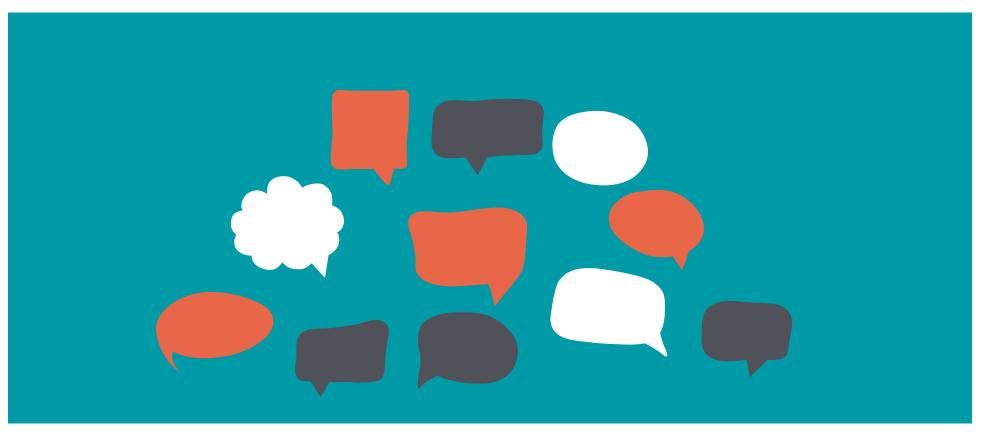
WRITING

Writing

- 1. Avoid repetition: your reader will lose interest
- 2. Try to write simple, clear sentences. Avoid long, run-on sentences that force the reader to do extra work
- 3. Include highlights in a well-organized executive summary so the reader can easily find mo e details in the report
- 4. Mispelled words or grammatical errors weaken the presentation
- 5. Use style guides for consistency

ENGAGE YOUR READER, FOCUS ON ACCOMPLISHMENTS





SHARE

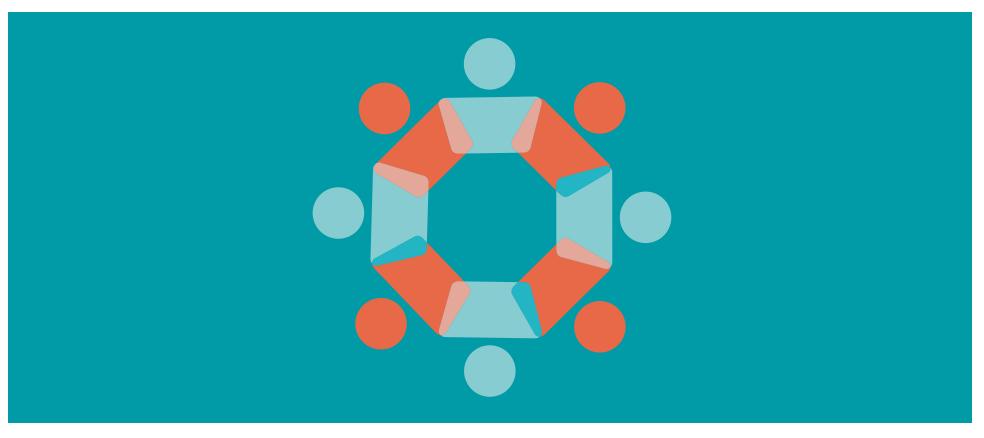
Share internally

- 1. Make sure all staff are on the same page so that the report comes together as desired
- 2. Have your M&E and Communications staff agree on how to pinpoint the most important data/ learning moments and how to portray it
- 3. Survey staff to improve the process

Share externally

- 1. Take advantage of donor, organization and local communication channels
 - Write a blog
 - Share on social media
 - Create news item for organization's website or email
- 2. Create a shorter printed piece that can summarize high level information





ACTIVITY

What is the process you use when putting together a report?

- 1. What works?
- 2. What's not working?