

NOTES ON REPORTS

1. Houle, CO. *Governing Boards*. National Center for Nonprofit Boards, Jossey-Bass Publishers. 1989.

The Operation of the Board, pp 132 - 133

The decisions made at the board meeting are often the culmination of a long process of preparation. As has been noted, a board has a continuing life of its own, and the groundwork for most actions should be laid before the time of the meeting itself. Committees should have sifted the evidence and formulated recommendations. The person most familiar with a particular problem should have the responsibility for summarizing it for the whole board. In general, the meetings of the board should be only the peaks of a continuing flow of interest and activity.

Any reports made to the board should be as well presented as possible. Much of the time of most meetings is spent scanning or listening to reports. Therefore, it is important to establish a tradition that whenever possible reports are written out and distributed in advance, that they are brief and interesting, and that they highlight the major points to be made. The members of a committee should be concerned not only with reaching proper conclusions but also with communicating them effectively. Sometimes the chairman needs to provide encouragement or help to the individuals concerned to enable them to do their reporting effectively.

As much of the time of the meeting as possible should be reserved for discussion. The wisdom of the board results from the pooling of the viewpoints of its members; the best possible decision on any issue usually comes when it has been thoroughly discussed. Moreover, discussion is a form of active participation and therefore creates both involvement and a sense of responsibility on the part of the members.

2. Winston, S. *The Organized Executive*. W W Norton & Company, 1983

Outgoing Reports: An Evaluation Method, pp 64 - 67

A report should not simply be a compendium of facts, but a judgment tool for management: the right information presented in the right way to the right people. Does every report produced by you and your staff meet this standard? Are any of them excessively detailed, wordy, poorly structured, burdened with extraneous facts, or even unnecessary? Use the following six-step procedure to analyze their necessity, brevity, frequency, and format:

Eliminate. Is this report necessary? What is the rationale for reporting a given piece of information? What objectives does the report forward? What questions does it answer? What would be the consequences if it were discontinued? Which reports would you dispense with if you were charged for them? Is the information available elsewhere?

Are you generating certain reports merely out of habit, or because you believe they offer you a power base?

Reduce. How many people really need a particular report? ...Sometimes it is sufficient simply to post one copy of a general memo on a central bulletin board for all to see.

Consolidate. Do any reports duplicate each other? Does information overlap? Could several reports be combined into one more concise document?

Highlight. Are key facts in prominent relief? Frame a question or series of questions that the report is to address. For example: what criteria should be developed to measure ourselves against competitors?

Are the facts supporting these questions accessible? Are conclusions articulated?

Simplify. Are reports concise and to the point? Is the text clear and sharp? Fight the tendency to tell the readers more than they need to know. Is there too much background information, technical material, or statistics? Could an outline, summary, graph, or chart convey the same information more sharply than a narrative?

Ideally, a report should meet the diverse information requirements of everyone receiving it, which might range from simple overview to full documentation. Solve this problem by bringing important points into relief by organizing reports longer than 2 – 3 pages according to the following structure:

I *Summary*: a one-page covering statement presenting the objective of the report, a summary or recap of the data, conclusions, and recommendations. Actions to be taken, if any, should be specific and clear. For many people, the summary is all that's required.

II *Body*: greater development of the data, and the reasoning behind the conclusions.

III *Backup* (when relevant): raw data, references, bibliography.

Issue. Would timely decision-making be crippled if a weekly report were distributed twice a month?

Here are some additional tips for writing reports:

- When possible, develop a standard report format. Use 'fill-in' forms or a checklist, or formulate several standard paragraphs and add a summary or interpretive narrative as needed.
- Enter a yearly schedule for periodic reports, including start dates, on your calendar or on a reports chart.
- Pace yourself. Spread the work as evenly as possible over the week. Draft material quickly, with the expectation of reviewing and revising later. Try to leave an interval of a day or two between writing and review.
- Prepare calculations, graphs, and so on separately, after you've finished the writing.
- When compiling a report for your boss that summarizes reports from your subordinates, ask staff to flag the elements that they consider the most important. Pull those items into a draft report, from which you can prepare the final version. By-product: You'll get a good feel for your subordinate's judgment.

3. Bartle, P. Different Kinds of reports for Mobilizers. (How to Write Reports; Part C of Writing Reports. www.scn.org)

Reports in General:

One over-riding principle that you should aim for in all report writing is to report on the results of your activities. This requires some analysis on your part that goes beyond a mere description of your activities.

You are working for a project that has several donors, and is channeled through an agency that needs to be informed about some specific things going on in the field. Your reports are the main pathways of information to the people who decide to fund this and other such projects.

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Monthly Progress Reports:

The following refers to any routine progress report: monthly, bimonthly, quarterly, bi-annual or annual. A progress report is different from a situation report (sitrep) in that a sitrep merely states what has happened and what was done about it during the reporting period. A progress report, in contrast, related activities to objective.

The most important source of information about any project can be the routine monthly progress reports. The donors, the headquarters of the implementing agencies, the leaders in the target group ...all need to know how well and how much the project objectives had led to attaining the project objectives.

The most important distinction you can make, therefore, is to distinguish between:

- Your activities (inputs), and

- The results of those activities (outputs) or effects on the target group.

Although progress reports may differ among several formats, somehow that distinction must be made. Design your report with two major headings: (a) activities, and (b) results, or, for each project objective, include a section on (1) activities and (2) results of those activities.

A common mistake made by many beginners is to think that all they have to do is to report their activities. Not so. A good progress report is not merely a descriptive activity report, but must analyze the results of those reported activities. The analysis should answer the question: "How far have the project objectives been reached?" Since you are not beginners, and are professional, you can demonstrate your professionalism by going beyond the description of activities in your progress report. (Suggested headings for organizing thoughts for the analysis: Desired results, Actions taken, % achieved, Reasons why, Factors affecting, Hindrances)

Always review the project objectives before writing any monthly progress report. In the analytical component of your report, you could list those objectives, each as a separate section with a separate sub title, and write an analysis of how well you have moved towards meeting each objective. Where you have not reached the objective, or if you have over or under reached any quantitative aspect of it, you include an explanation of why.

Narrative Reports

A detailed monthly narrative report should include how far each of the intended objectives have been reached, what were the reasons they were not fully reached, any lessons learned, and suggestions and reasons about changing the objectives if they were found to need changing.

The narrative report can include information about events and inputs (what actions were undertaken but should emphasize outputs (the results of those actions in so much as they lead to achieving the stated objectives).

Mobilizers' Routine Reports

Look at the difference between a community project report and a community mobilizer's report; remember that their objectives are different. The community project report should be simple, such as "to build a school". What are mobilizer's objectives (for reporting on progress)? ...

In simple terms, the desired result of the work of a mobilizer is a mobilized community. The job description of a mobilizer is to mobilize; and that encompasses several elements (e.g. community unity building, ensuring participation of marginal or vulnerable groups, setting community priorities, management training, encouragement, leadership without politics).

[Lois comments re how this would translate to HSA board members:

Community unity building – common sense of purpose or support of programs by all members of HSA

Ensuring participation of marginal or vulnerable groups – mentor program for new member at large, first time attendee at EdCon, new units, units in trouble

Setting community priorities – bring input from members to board to set educational program definition

Management training – recruiting for board positions, helping to develop unit chairs or members for unit formation

Encouragement – recognition of successful programs, activities]

Field Trip Reports:

A field trip should have a purpose, so your report on the trip should begin with indicating what was the purpose of the trip. The purpose should justify making the trip, even if you fail to achieve what you set out to do on the trip. The purpose should directly relate to at least one of the objectives of the project.

...

A field trip report should emphasize the results of that trip. Did you achieve your purpose? To what extent? Why? What unexpected observations did you make? What consequences do those observations have? Have you observed any indicators of any results of previous projected activities? Should any project objectives be modified from what you observed? Did you observe any new problems? Did you come to any new conclusions, alone or in discussion with some of the persons you met or meeting you attended?