

**Most MPAs have requirements for regular progress reporting. There may also be requirements for a range of other reports. Report writing is an essential skill to develop, either for the MPA manager or other staff delegated to this task. This sheet provides guidance on how to prepare reports and a suggested outline for annual or project reporting.**

Planning, monitoring and reporting are all inter-linked. Progress reports are essential to measure achievements, to focus activities and improve subsequent work plans, to encourage new funding, and to provide a historical record and thus be available for future reference, particularly if impacts of the work are to be assessed. MPAs generally have a series of different reports that have to be produced on a regular basis for various reasons, including progress reports to the management agency and donors. In addition, many MPAs have to meet donor reporting guidelines for some of their activities and these may show a variance in specifications. While some have clear guidelines, others are vague and others state that an institution's own guidelines can be used as long as they are "good".

Compilation of progress reports should involve key individuals involved in the work undertaken. Use can be made of photos, maps and graphics where appropriate, as this can greatly enhance the usefulness of the report. However, figures should be used to clarify points made, not to duplicate information. Don't spend so much time on figures that the content of the text suffers. As the WIOMSA training manual, says: 'What you say is ultimately more important than how you say it, but presentation is important if the report is to be read and taken seriously'.

A good report is not necessarily a long report, despite the many sections that should be included. Care should be taken to avoid duplication and text should be relevant to the section and concise and clear, so that it is immediately understood by the person reading it. Many donors as well as other report 'users' will have a lot of documents to read, and thus a report that clearly conveys the message and is to-the-point is a good report.

## REPORT STRUCTURE

Despite the variety of formats that may be required, most reports generally require the same topics and content to be covered. The following reporting structure may therefore be a useful guide but should be adapted to suit the specific situation. In particular, if there is a logframe (see sheet C4), the report should reflect the structure of this, and report on each of the levels (e.g. goal, purpose, outputs/results).

**Title and cover** - The cover page should clearly show the title and date of the report, and often it should give details such as type of report (e.g. annual/semi-annual/quarterly), period it covers, and number and name of project (if the report is a project report).

**Executive summary** - This should capture the essence of the report and should include an overview of its contents and summary of its conclusions or findings. It should be the last section to be written, although it is placed at the beginning, and it should be kept short. It should not contain anything that is not referred to and supported in the main report.

**Background and/or introduction** - Some donors require a summary giving highlights of the activity being reported on, including location, the justification and rationale for it, start and end dates, and planned period. The introduction should set the tone of the report and summarise the goals and objectives. It should include any changes that might have taken place in the logframe or reporting schedules since the last report was written.

**Update on activities** - This section should provide an overview of the status of activity implementation during the reporting period, highlighting the extent to which planned activities were implemented. The report should refer to the indicators and their means of verification at the activity level in the LFA, and where there have been deviations from what was planned, this should be explained. It is advisable to make a brief narrative statement highlighting any notable achievements and/or deviations, and to present a detailed account of progress in an LFA type table indicating status of implementation.

**Results** - This section should provide an analysis of the extent to which implementation of activities has contributed to the achievement of results (sub- and key results), planned results achieved and whether the



activities were appropriate. This analysis will be particularly useful in half-yearly and annual reports. The report should refer to the indicators and their means of verification at the appropriate level in the LFA, and provide supporting material as evidence of achievement, such as special reports, workshop reports, and others. Provide a list of publications and other outputs.

**Contribution to purpose and longer term goal** - This section should provide an analysis of the extent to which the activities and results achieved have contributed to achieving the project purpose and its long term goal. In addition to further reflection on the effectiveness and relevance questions, an analysis of impact and sustainability should be attempted, thus: To what extent have the longer-term goals been achieved? What should be done differently to ensure progress towards longer-term goals? Have there been any unanticipated positive or negative consequences? Why did they arise? If negative, what should be done about it? Will there be continued positive impacts as a result of the activity once it has finished and, if not, why? What should be done differently to ensure sustainability? Analysis of contribution to the longer-term goals will usually not be done in quarterly or half-yearly reports, unless something very significant happens during the reporting period.

**Deviation from the objectives/key results/goals** - State whether the activity is still on track. Has the logframe been revised extensively as a result of a review and its recommendations, or for any other reason?

**Obstacles encountered and solutions identified** - Obstacles and problems may have origins within the MPA or project (e.g. staff changes or illness, breakdown of equipment), or outside (e.g. bad weather, changes in government policy). An analysis of problems will help the donor, the project staff and the MPA staff understand the constraints under which the activities are being carried out. It is especially important to describe the solutions that have been found, or the actions that have or will be taken to overcome the obstacles, and any lessons learnt. Many people feel they must only report on successes and achievements. However, there are probably no projects that do not encounter problems at some time. These should be identified and an explanation given of the impact they had on the progress of the project.

**Plans for the next reporting period** - This is not always required, but it can be very useful for donors and others using the report if there is a short summary of the main activities to be carried out in the next reporting period. This will show that "lessons learnt" and activities postponed in this period are being acted upon. Reports should be focused, but nevertheless reflective.

**Financial report** - This section should include the detailed financial report (usually as a spreadsheet), as well as a short text summary that shows how the resources have been used and what problems might have been encountered, highlighting significant deviations from the approved budget. Any requests for approval for changes to the budget, such as for budget reallocations, should be

included in this section. Most donors have quite specific instructions on financial reports.

## FINALISING A REPORT

This involves the following steps:

**Checking the spelling** - Use the computer spell checker (select appropriate language version).

**Editing** - Check logic, content with respect to headings, references, and consistency.

**Proof-reading** - This should be done by someone other than the author.

**Acronyms and abbreviations** - Provide a glossary.

**Numbering** - Check that annexes, figures, tables etc are correctly numbered.

It is important to make sufficient copies of the report for all partners as well as the donor, and to keep reports on file and use the previous one as a 'template' for the next one. This will allow the donor and other readers to compare achievements between years. However, do not 'cut and paste' the same information from report to report. Apart from general information in the background or introduction sections, the information to be provided will differ in each report.

### KEY POINTS FOR THE MPA

- Ensure that MPA staff who are responsible for report writing have appropriate training.
- Make sure that all staff involved in the submission of reports are aware of schedules and deadlines.
- Before reports are submitted, look at them critically, as if you were the recipient.
- Ensure that reports are filed in both hard and electronic form and are accessible for future reference; associated correspondence should also be filed.

### Sources of further information

Parr, S. & Fielding, P.J. 2003. Communication and Public Relations. Module 5. p.149-186. In: Francis, J. et al. (eds.). *Training for the Sustainable Management of Marine Protected Areas: a Training Manual for MPA Managers*. CZMC/WIOMSA, The World Bank.

Swamy, K. 1997. Report writing. In: Samoily, M. (ed.) *Manual for Assessing Fish Stocks on Pacific Coral Reefs*. Queensland Department of Primary Industries, Brisbane. 78pp.