REPORT WRITING HANDBOOK

Pakistan Centre *for* Philanthropy

Prepared by Pakistan Centre for Philanthropy

Under EU funded project: Building resilience of CSOs and youth to Covid-19 in GBC

Developing Report writing skills

Report writing is an essential skill for all professionals. In fact, it has become a key component in the routine operations of several organisations, especially, civil society organisations (CSOs) who rely largely on both international and local donor support to fund their projects. A civil society organisation (CSO) is any non-profit, voluntary citizens' group which is organised on a local, national, or international level. It is task-oriented and driven by people with a common interest. CSOs perform a variety of services and humanitarian functions, such as highlighting citizens' concerns to governments, monitoring policies, and encouraging the political participation of people at the community level.

CSOs include nongovernment organisations (NGOs), professional associations, foundations, independent research institutes, community-based organisations (CBOs), people's organisations, social movements, and labour unions.

1. **Objectives**
    The aim of this training session is to help the participants:

    - become aware of the importance of developing effective report writing skills
    - develop a better understanding of the concepts and practices of writing reports
    - acquire relevant skills to plan, structure, and write coherent, clear, and concise reports
    - become familiar with the format and structure for project reports
    - gain an improved understanding of appropriate language used in reports
    - write persuasive conclusions and recommendations
    - get practical experience of writing project reports

2. **Methodology**
    It will be an interactive course that combines teaching and practical exercises, for example, interactive lectures, class discussions, group work, and brainstorming. Participants will be encouraged to discuss and clarify their concerns on the subject and will get hands-on experience in writing reports.

Why is it important to learn to write reports?

- Generally, CSOs are required to prepare and submit monthly reports, quarterly reports, annual reports, project completion reports, project activity reports, or the meeting minutes during implementation of most of the projects.

- CSOs use report writing as a means of communicating with donors. Through reports, they provide regular, detailed, and accurate updates about the progress they have made in the given timeline; the number and nature of activities they have implemented; the ways in which these activities have been implemented; and how efficiently have they utilised the allocated funds and resources.

- The ability to produce an effective report is important in establishing a CSO's credibility in the eyes of the donors, stakeholders, and beneficiaries. When CSOs present accurate factual information in their project reports, it enhances their accountability, transparency, and trustworthiness. This practice ensures the sustainability of an organisation and eventually, improves its chances of expanding its donor base.

- As a result, mastering the art of report writing has become crucial within the civil society sector. Good report writing practices not only project a positive image of the organisation, they also increase their visibility and improve their capacity to contribute effectively towards social change and development.

What is a report?

Definition: A *report* is a concise spoken or written account of an event, incident, or issue that someone has observed, heard, done, or investigated. A written report is one that is written with a clear purpose and is meant for a specific audience. The report can vary in length, format, style, and content based on the purpose of the report and the target audience. Reports should engage the reader and provide reliable information as simply as possible.

What is the purpose of report writing?

*Purpose***:** The main purpose of a report is to inform about something in a clear manner. It seeks to convey credible information, recount events, analyse facts, investigate a problem, or to propose solutions and recommendations. Before writing a report, you need to know the exact purpose of the report and reflect upon the following aspects: Report writing is an essential skill for all professionals.

- Who are you writing the report for?
- Why are you writing the report?
- What information are you covering in the report?
- When do you need to complete it?
- Where will it be published or presented?
- Have you got enough information?
- How will you gather relevant data for your report?

What are the contents of a report?

*Content***:** The contents of a report may vary depending on its purpose. They may include:

- details of an event or situation
- consequences or the ongoing effect of an event or situation
- evaluation of statistical data or analytics
- interpretations from the information in the report
- predictions or recommendations based on the information in the report
- comparison of the information to other events or reports

*Key Insights While Planning to Write a Report***:** A report writer should reflect upon the following aspects while planning to write a report:

Prepare: Before you write a report, you must ensure that you have all the essential information.

Research: Spend time finding, requesting, and collecting a store of data that directly relates to your topic.

Organise: Plan ways to sort and organise information to support the purpose and scope of the report. Interpreting data and formatting it in a way that your readers understands is an important part of report writing.

Illustrations: Use illustrations or graphics, such as tables, diagrams, and info graphics to display indicators and key findings. Creating charts, graphs, or timelines will make your raw information easier to comprehend.

Write: Use a well-defined structure, and adjust the style, format, and language of your report to suit the right audience. For effective report writing, keep it short and simple.

Edit: As with any formal piece of writing, reports can be refined and polished thorough proofreading and editing.

Read it Out: If you are going to present your report in a meeting, read it out loud beforehand to determine the timing, speed, and tone of your presentation delivery.

Types of Reports: There are two broad categories of business reports: formal and informal reports.

Formal Report

A formal report is highly structured and is relatively longer in size. It is an official document that contains detailed information, research, and data needed about a certain project. This report is generally written for the purpose of solving a problem. Some examples of formal reports include project reports, company annual reports, social reports, eyewitness accounts, as well as reports featured in magazines, newspapers, and academic journals.

Informal Report

In contrast, informal reports are less structured and are shorter in size. They are usually short messages with free-flowing, casual use of language. We generally write internal reports that communicate important information to inform people inside an organisation as informal reports. Examples of informal reports are memos, communication documents, emails, and papers for an internal group or team members. They use relatively causal language such as personal pronouns and contractions. Although, an informal report may have several sections, it is typically shorter than a formal report and a *table of contents* page is usually not included.

ACTIVITY TIME - LET'S PRACTISE!

Task # 1: Group Activity (*Total Time: 20 minutes*)

- Ask the participants to brainstorm the following questions as a group:

  i. What types of reports do you need to write in order to share information about project deliverables?
  ii. What are the key components of the reports you write?
  iii. What are the most important things a donor or funding agency wants to know?
  iv. What information should be attached with a report when it is submitted?

  The trainer should note down the input/responses of the participants on a white board and then conduct a group discussion based on their responses.

For the scope of this workshop, we will focus on the essential components of project reports.

What is a project report?

A project report is a document that describes the overall status of a project or specific aspects of the project's progress or performance. Regardless of the type of report, it consists of project data based on economic, technical, financial, managerial, or production aspects. The main purpose of a project report is to keep clients, stakeholders, and team members updated on the status of various projects you are working on. This may include a timeline of your progress, a description of project activities undertaken, the deadline for each activity, and their outcome.

Who is a project report for?

A project report is written for a professional or practitioner audience, rather than an academic audience. It should include concise and relevant information and clear-cut conclusions. Every stakeholder will require different type of information relevant for them. It could include sensitive or confidential information, such as financial contracts written only for a small group of people, often senior managers. Alternately, it could include detailed information about the activities and impact of donor-funded projects, which can be shared with a wider group of readers, such as representatives of various organisations or the general public.

What is the structure of a project report?

- The contents of any project report should be presented in a clearly structured format. If the concerned donor has provided a recommended structure and format, please follow it.
- The facts and findings should be organised in a logical order under well-defined sections and headings so that the information is easy to locate and follow.
- A project report should include a balanced and objective analysis of the topic. Therefore, the writer should avoid referring to his or her personal beliefs, views, opinions, or emotions in the report.
- A project report should consist of eight clearly defined sections:

1. Cover Page
2. Executive Summary/Abstract
3. Table of Contents
4. Introduction
5. Main Body
6. Conclusion
7. Reference List
8. Appendices

What are the various components of a project report?

Usually, every CSO designs its own format for internal reporting to suit its requirements. However, for the purpose of external reporting, it uses the formats or templates recommended by the donors. Although, the components of project reports may vary to some extent, generally, formal reports contain all or some of the following elements:

1. *Cover Page/Title of the Report***:** This is the first page of your report. You may include a cover page to your report displaying the title, along with a suitable image that reflects the theme of the report. Next, you should explicitly mention details regarding the recipient(s) of the report or for whom the report was prepared. This should be followed by details of the person(s) who prepared the report accompanied by the date of the preparation of the report. This will help to capture the interest and attention of the reader.

2. *Table of Contents:* If the report is large, be sure to add a table of contents. It should specify the title and page numbers for each chapter or section. This sequential list of contents provides the organisational structure of the report and helps the readers locate specific sections within the report.

3. *Executive Summary:* This section will briefly summarise the report. It is usually one paragraph long, approximately 250 words in length. Although, the executive summary is placed at the beginning of the report immediately after the title page and the list of contents, it should be written at the end once the entire report has been completed and the conclusions drawn. This is because an executive summary briefly outlines the aims and objectives of the report, the data obtained, the activities incorporated, the methods of analysis, the outcomes, limitations, and recommendations of the report so that the readers know exactly what it is about and understand its essence. The goal of the abstract is to stimulate the readers' interest, and encourage them to read the full report.

4. *Introduction:* The report begins with the introduction, which provides a brief description of the project. The length of the introduction depends on the objective of the report, the intended audience, as well as the length of the report itself.

   - It includes relevant context, history, and background information about how this project came about, who sponsored it, and details about the client organisation.
   - It contains the problem statement specifying what issue or subject is being explored or evaluated, why is it important to address it, and the way it is being addressed.

- It introduces the methodology and highlights the parameters of the research to find relevant information.
- It provides an overview of the aims, objectives, purpose, and scope of the report.
- It mentions any major conditions that were imposed on the project by the donor or any limitations within the scope of the research.
- It outlines how the rest of the report is organised.

5. *Main Body of the Report*: The main body of the report provides a detailed description and analysis of events or activities undertaken to meet the defined project targets. It includes accurate and factual information presented in a logical and systematic manner.

- It outlines key issues, research, project activities, practices, or interventions and the reason for adopting this approach.
- It presents the findings, outcome, or results of the intervention, supported by evidence gathered through data analysis.
- It includes the interpretation and analysis of the findings/results – what were the strengths and limitations of the intervention, whether the outcome was positive or negative, expected or unexpected.
- It discusses lessons that can be drawn from this activity (experiment, research, or intervention) and ways in which it can be implemented differently in future.
- If the discussion section is lengthy, arrange the points into headings and subheadings. Organising the points in a logical sequence provides a clear structure for the content.
- All data sources used in this section should be correctly cited and referenced.

6. *Conclusion*: The conclusion should bring the report to a close. It should pull together the main points emerging from the report and sum-up the overall conclusions and recommendations drawn from the project.

- It should summarise the key take away points of the report.
- It should not introduce any new data or material at this stage.
  It should provide an analysis of the main findings of the project activities and their impact on the beneficiaries.
- It should mention future course of action and provide clear recommendations and solutions based on the issues and limitations discussed in the report.

7. *Reference List*: In your reference list, make a list of all the documents and data sources you used or referred to throughout your report.

8. **Appendices:** In the end, include the appendices. List all relevant documents that support your report and which you plan to attach to it. It should include:

- lengthy lists that cannot be included in the main body of the report
- detailed descriptions (essential details should be in the paper itself)
- instructions to participants; tests, surveys, inventories
- demographic details for subpopulations studied by the paper

What type of language is used in project reports?

- Formal reports are usually written from an objective, third-person point of view ('he', 'she', and 'it'). Alternately, you may write it in the second person ('you', 'your', and 'yours') if you would like to present the report from the readers' point of view. The first-person perspective ('I') is rarely used in formal reports and it may only be acceptable if you mention a personal experience in the report.

- Use the past tense because the events or activities being recounted have been completed.

- Even though project reports are formal documents, you are not required to use very complex words or grammar. Instead, use simple, crisp, but formal language to get your meaning and message across to the wider audience of readers. Remember that complex language may distract the readers.

- A mix of active and passive voice can be used, although the active voice is more preferable.

- Organise the information within paragraphs to make the document better structured and more readable. Use one paragraph for one idea only. Keep your sentences short for greater impact.

- Avoid jargon, abbreviations, complex sentences or phrases, colloquialisms, and language that expresses your personal opinions, attitudes, or bias.

- Avoid spelling, punctuation, and grammar errors.

- Leave sufficient time at the end for editing and proofreading.

- Do not mix tenses in one sentence or paragraph.

- Be precise, accurate, and stick to facts. For example, instead of writing, "Some project beneficiaries said that they were dissatisfied with the quality of the deliverables," write: "42% of our beneficiaries expressed dissatisfaction with the infrastructure of the schools and the quality of education."

- Choose suitable vocabulary and style of writing that matches the comprehension level of the reader.

ACTIVITY TIME - LET'S PRACTISE!

Task # 2: Pair Activity (*Total Time: 25 minutes*)

- Organise the participants into pairs. Share a formal report with them that follows an incorrect format and uses informal language. Ask the participants to work in pairs to discuss and identify the errors in format, language, spellings, punctuation, and grammar. (***15 minutes***)

- Next, randomly ask different groups to point out the errors they have found in the report and to offer suggestions for resolving them. (***10 minutes***)

ACTIVITY TIME - LET'S PRACTISE!

Task # 3: Individual Activity (*Total Time: 1 hour, 15 minutes*)

- Share the template of a project report with all the participants. Ask each participant to work individually to write a formal report for the senior manager of their NGO on the following topic:

   Factors responsible for the low enrolment of students at NGO run primary schools in the district of Diamer, Gilgit-Baltistan.

Project Report Template

Project Title

Names of Team Members

Organizational Affiliation of Team Members

Requested by and submitted to

Client's Name

Client's Affiliation

Date

2. *Executive Summary/Abstract*

3. Table of Contents

4. Introduction

5. Main Body

6. Conclusion

7. List of References

8. Appendices