

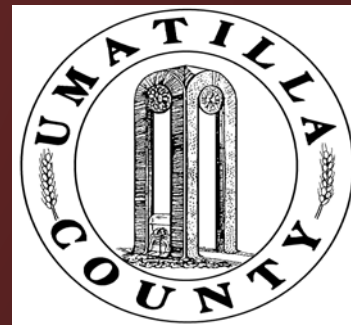
End of Project Reporting...Starts at the Beginning

WHAT YOU NEED TO KNOW AND WHY YOU NEED TO GET IT RIGHT



Training - Strategy - Implementation - Results

Susan L. Bower, MBA



Introductions:

Name

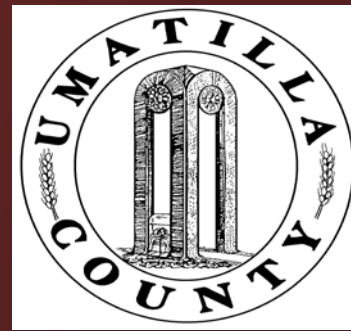
Organization

What do you hope to gain from this workshop?



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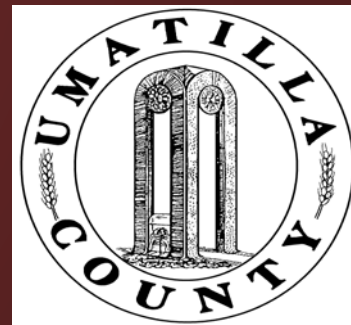
Overview:

This workshop will discuss best practices that will help entities to establish both **quantitative** and **qualitative metrics early** in the **planning process**. This will provide more accurate and meaningful end-of-project reports for entities and funders. It will also go over the common material that funders ask for in their reports, as well as some **tips to stay organized and ahead of the reporting cycle**.



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The Plan:

- I. Importance of an End of Project Report
- II. Getting Started
- III. What You Will Need
- IV. Organization
- V. Evidence
- VI. The Length
- VII. Deadlines
- VIII. The Thank You
- IX. Break
- X. Evaluation: A Closer Look

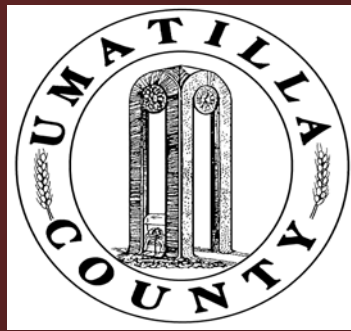


I. The Importance of End of Project Reporting



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I. Importance of Reporting:

Why do you need to write an end of project report?

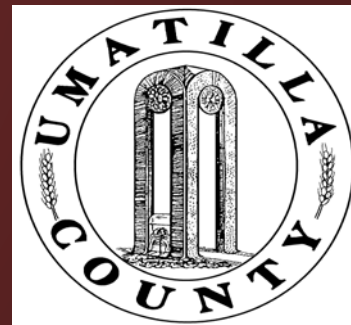
Accountability!!!!

For you and your organization
AND for your funders



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I. Importance of Reporting:

Why do you need to write an end of project report?

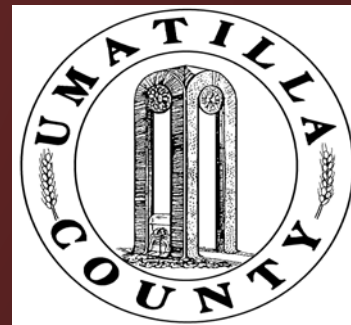
For the Funder:

- Funders want to know what you did with their money.
- They have donors that they are accountable to.
- They have their own goals they are trying to reach.
- They might fund your organization or a project in the future.



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I. Importance of Reporting:

Why do you need to write an end of project report?

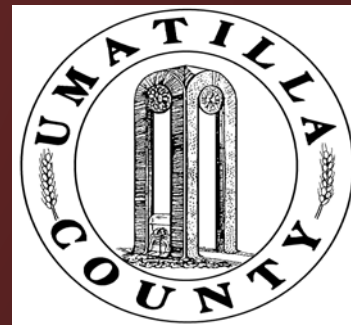
Credibility!!!!



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For you and your
organization



I. Importance of Reporting:

Why do you need to write an end of project report?

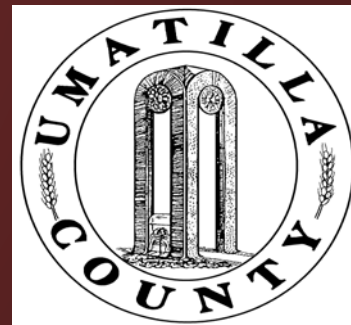
For You and Your Organization:

- Understand what worked well and what didn't.
- Evaluate your effectiveness and efficiency as an organization.
- Know if your projects/programs are helping you achieve your goals.
- Know what you are spending money on.
- Will help you plan projects in the future.



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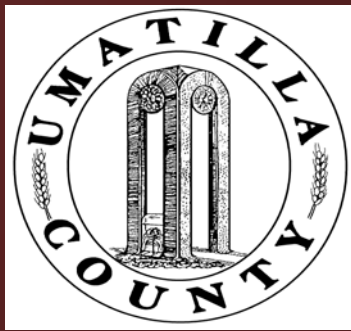


II. Getting Started



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II. Getting Started

START AT THE VERY BEGINNING

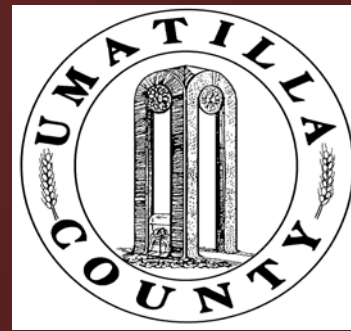
End of Project Reporting starts in the project/program planning stage

- Include a plan for reporting in your initial project plan
 - Whether or not the funders ask for a report
 - Even if the information will be kept internally



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II. Getting Started

START AT THE VERY BEGINNING



Every project should have clearly defined **Goals** and **Objectives**

Goals: What you are attempting to accomplish at the end of the project

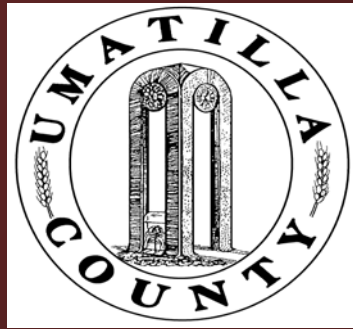
Goals should be one sentence

Goals should be clear and concise



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II. Getting Started

START AT THE VERY BEGINNING

Objectives/Activities: are the checkpoints along the way to your goal. Know how far you have come, know how much further you have to go until you reach/achieve your goal.

Objectives and Activities should be SMART

S: Specific

M: Measurable

A: Attainable

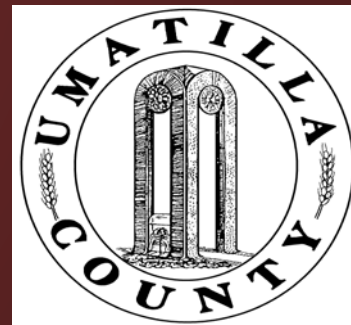
R: Realistic

T: Timebound



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II. Getting Started

START AT THE VERY BEGINNING

Evaluation Plan

Evaluations are a critical and should be part of your project plan

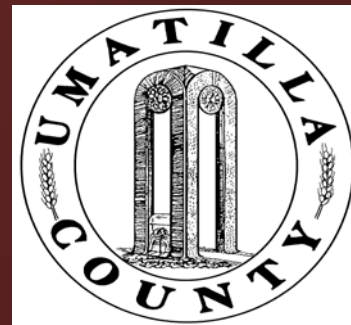
Evaluations planned early:

- Are well thought out and prepared
- Are more manageable
- Will provide you with accurate, substantial and quality information/data



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II. Getting Started

START AT THE VERY BEGINNING

Evaluation Plan

Defining the Terms

Evaluation

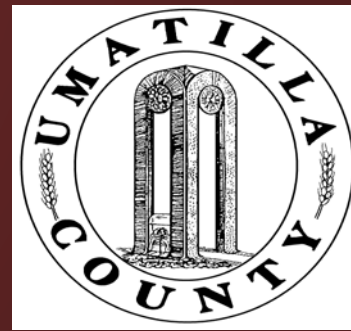
Qualitative vs. Quantitative

Metrics



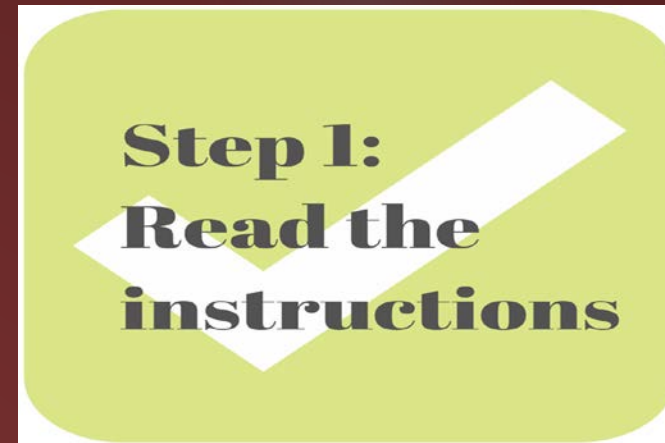
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II. Getting Started continued...

Re-read the original application and the funders instructions for the report

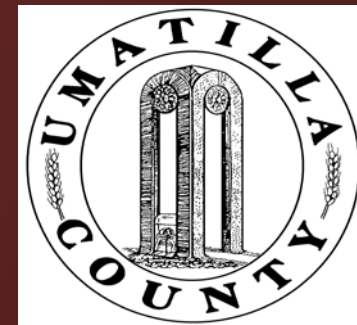
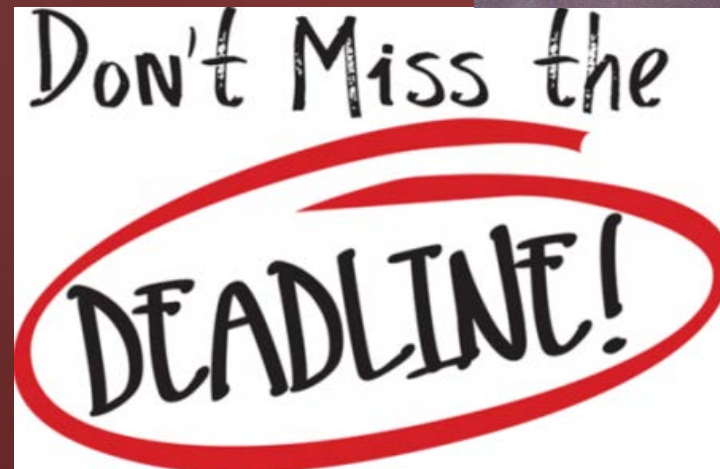
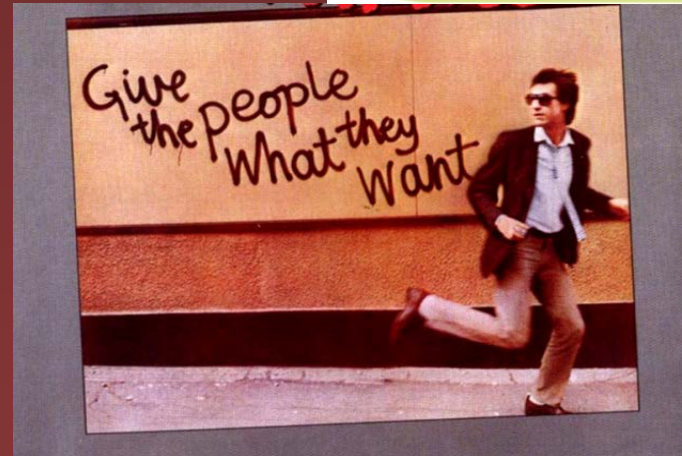


Know and understand what the funder wants from you

Is there a deadline?????

YES – STICK TO IT!

NO – Do It Anyway!

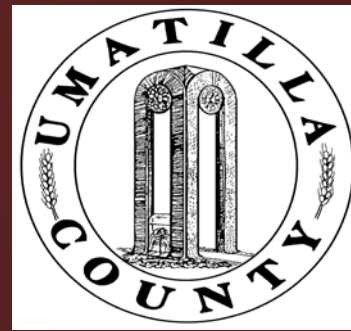


III. What You Will Need



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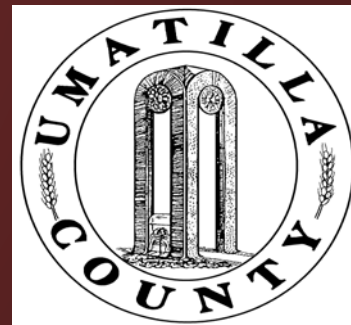


III. What You Will Need

Most funders will want the following:

Narrative:

- ❖ What did you do?
- ❖ Did you do what you said you were going to do?
- ❖ Did anything change? Why? Explain.
 - ❖ Note: Always keep funders up-to date in case of changes



III. What You Will Need

Financial Statements and Receipts:

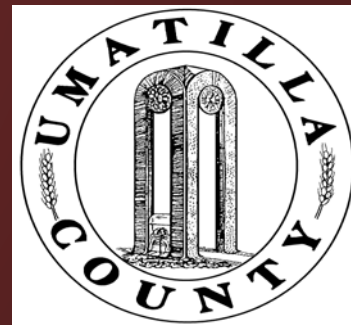
- ❖ How did you spend the funders money?
- ❖ Did you spend the money as you said you would in the initial request?
- ❖ Did your budget change? Why?
- ❖ Do you have your receipts?



III. What You Will Need Cont.

Information from the Evaluation:

- ❖ What were the results or impacts of the project?
- ❖ Were your goals/objectives achieved?
 - ❖ How do you know? How will know?
 - ❖ What were the keys to success?
 - ❖ If not, Why?



III. What You Will Need Cont.

Also include...

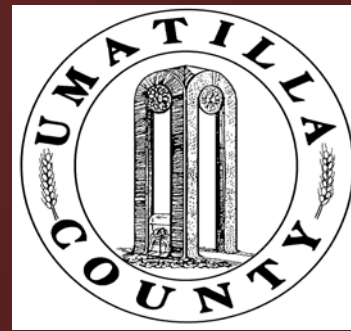
Lessons Learned:

- ❖ What worked?
- ❖ What didn't work?



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III. What You Will Need Cont.

Plans for Sustainability:

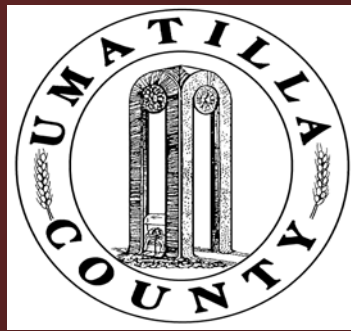
- ❖ Is this a long-term project?
- ❖ How will it be sustained?



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...This information is good internally as well as for the funders

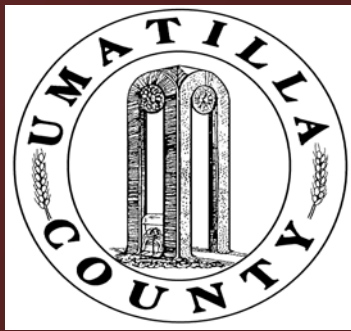


IV. Organization



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IV. Organization

Use SUBHEADINGS and BULLET POINTS:

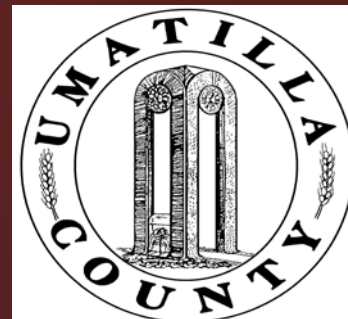
➤ Makes the document easy to read and follow

Bullets or Numbered Lists

- Bullets or numbered lists help call attention to main points, details, or examples the author wants you to notice or know.

Some common text features found in books are:

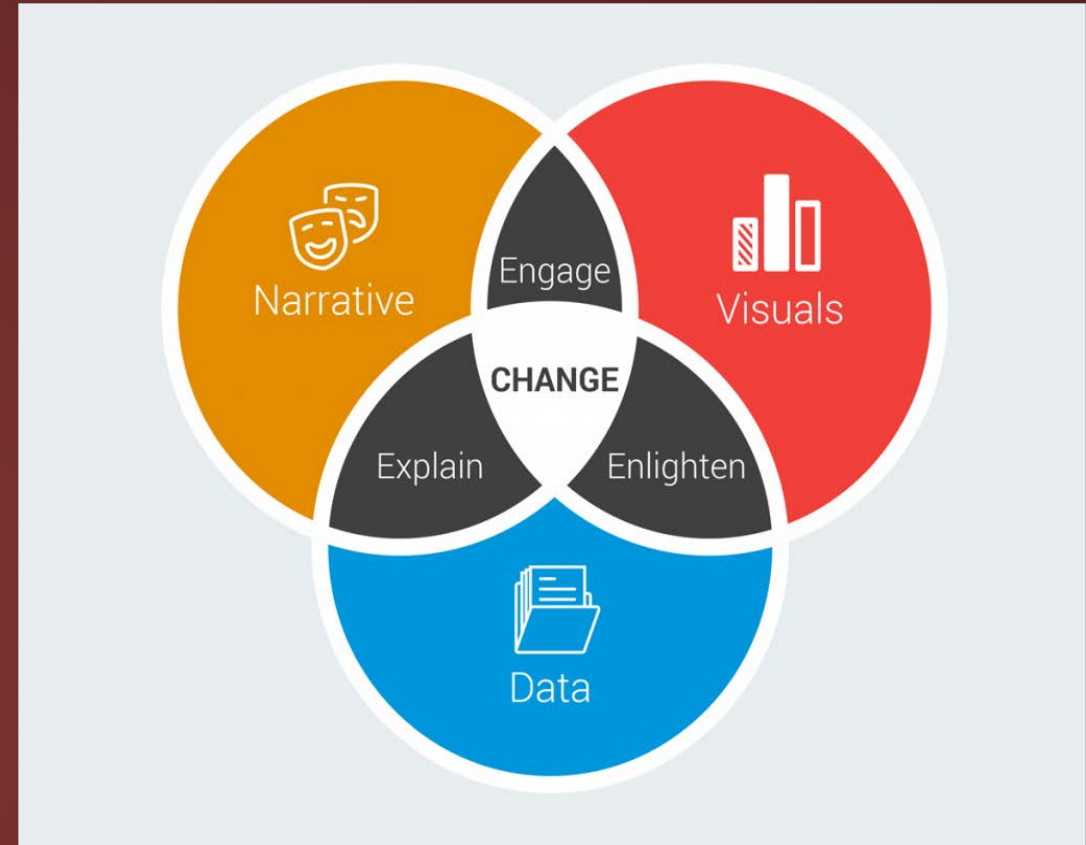
- Table of Contents
- Glossary
- Index
- Underlined, Bold, Italicized, or Highlighted Words
- Headings and Subheadings
- Font (styles and size and color)
- Diagrams, Charts, Tables, Graphs, and Maps
- Pictures or Illustrations
- Sidebars
- Captions
- Bullets or Numbered Lists
- Parenthesis



IV. Organization

Use Graphics, Charts other Visuals:

- Eye Catching
- Breaks up the information
- Illustrate the information in a different way

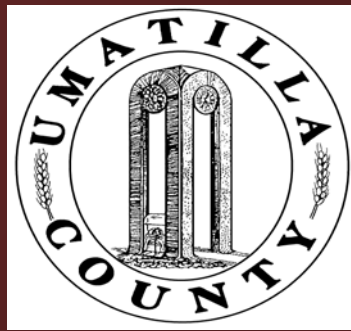


V. The Impact: Sharing the Story



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V. The Impact: Sharing the Story

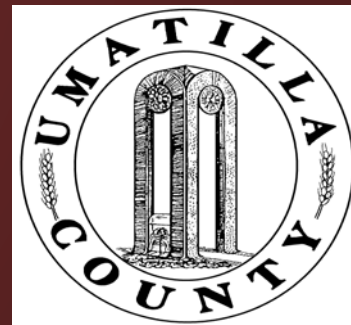
Add a Human Element:

- Share Stories from those who participated
- Letters from those who benefitted from the program/project
- Include photos from the event



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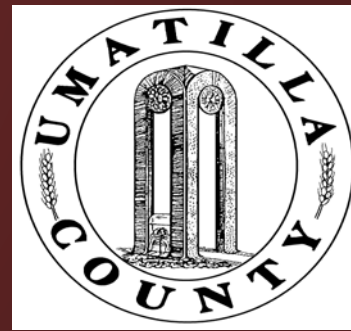


VI. The Length



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VI. The Length

- ✓ Check with the funder
 - Some of them will have specified limit (min. or max.) – RESPECT IT
- ✓ If no length is specified by the funder, aim for between 5 and 10 pages printed (includes all supporting documents)
- ✓ Be Clear and Concise

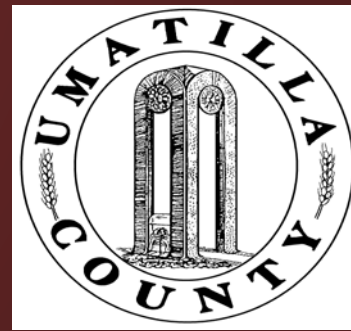


VII. Deadlines



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VII. Deadlines

Double Check Deadlines!

Some funders will have a specified timeline

Others won't

If you are unsure, ASK

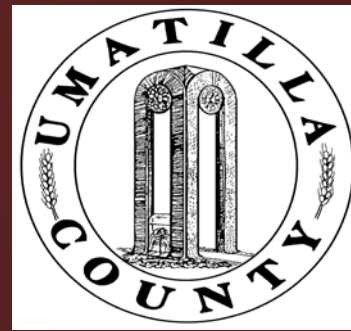


VIII. Say THANK YOU



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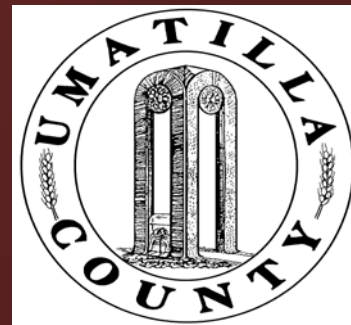
VIII. Say THANK YOU



Don't forget to say
THANK YOU



How have you thanked funders in the past?

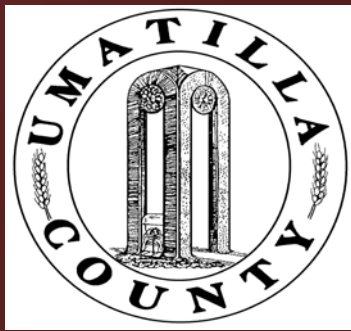


IX. Break



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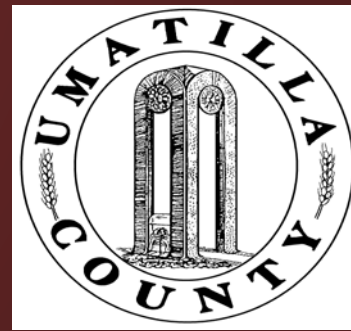


X. Evaluation: A Closer Look



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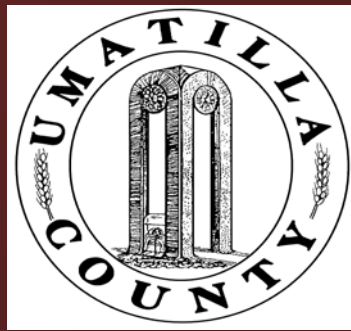
X. Evaluation: A Closer Look

Evaluations are incredibly important and should be considered, planned and prepared for in advance.



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X. Evaluation: A Closer Look

Review:

What is evaluation?

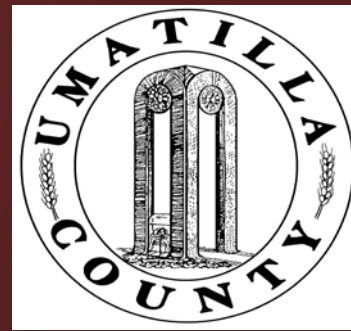
Why is evaluation important?

Why should you plan your evaluation strategy early?



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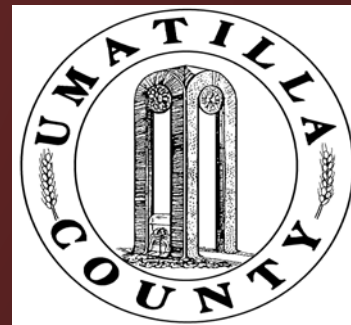
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X. Evaluation: A Closer Look

Evaluation:

- ❑ Plan your evaluation early – Demonstrates clearly to your funder what you are trying to accomplish
- ❑ Evaluation plans help answer and organize the following:
 - ❑ What you want to know? What are your goals and objectives?
 - ❑ How you will measure success?
 - ❑ How will you know you achieved your goals or objectives?
 - ❑ Why? Why do you want know these specific details?



X. Evaluation: A Closer Look

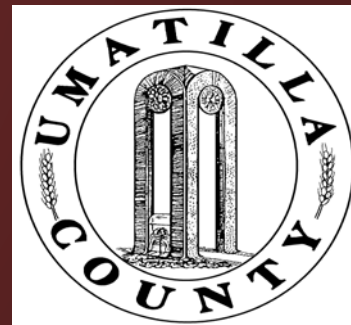
Have you asked the following questions?

- What is it we are doing?
- Why are we doing this project/program?
- Who are we doing it for?
- What is success?
- What do we need/want to measure?
- What questions need to be asked?
- How do we ask?
- When do we ask the questions?
- How will we collect the information?
- How will we translate and interpret the information gathered?



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X. Evaluation: A Closer Look

Most Common Evaluation Tools

- Questionnaires/Surveys/Checklists
- Interviews
- Document Review
- Observation
- Focus Groups



X. Evaluation: A Closer Look

Looking ahead to the next workshop...

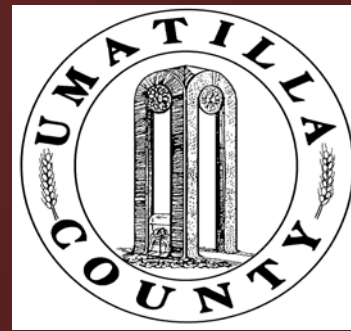
What information, about evaluations, would be most important/beneficial to you and your organization?

Is there anything specific, about evaluation or evaluations, you would like covered in the next workshop?



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Questions???

OR

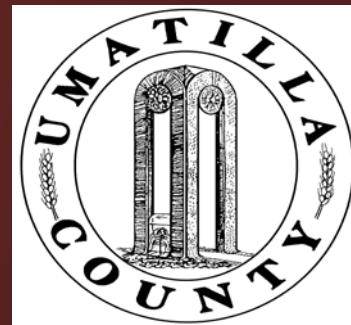
Comments???



Eastern Oregon
Business Source

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Browning, B. A. (2014). *Grant Writing For Dummies, 5th Edition* (5th ed.). John Wiley & Sons.

www.resourcecentre.org.uk/information/reporting-to-a-funder

www.socialsolutions.com/blog/how-to-write-a-grant-report

www.cepf.net/Documents/Final.Shirley_Pierece.pdf

www.cityvision.edu/wiki/introduction-grant-reports-tips-and-tools-preparing-reports-your-funders

www.siteresources.worldbank.org/INTKRGYZ/Resources/Reporting_to_funders.pdf

<https://www.nationalservice.gov/sites/default/files/resource/TypesofEvaluation.pdf>

piercecountywa.org/DocumentCenter/View/7390

<http://blog.visme.co/data-storytelling-tips/>

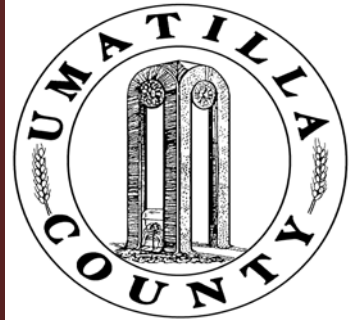
<https://www.slideshare.net/mlhammer88/text-features-power-point>

<http://www.photos-public-domain.com/2016/02/17/tattered-edges-of-book-pages/>



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DEADLINE Picture

<http://www.bonitapawprint.com/opinions/2016/05/05/whats-a-deadline/>

Give the people what they want

<http://allthingsd.com/20130224/we-are-all-huffington-post-now/>

Step 1 Read the Instructions

<http://www.nostorytoosmall.com/posts/instead-of-failing-read-the-instructions/>

Deadline 2

<https://pixabay.com/en/photos/deadline/>

Receipts

<http://www.smallbiztechnology.com/archive/2016/03/10-apps-manage-pesky-business-receipts-will-save-sanity.html/#.WVQWzVGOyM8>

Deadline 3

<https://pixabay.com/en/time-levy-deadline-hand-leave-pen-481444/>

Questionnaire

<http://www.holywellswimmingclub.co.uk/questionnaire/>

Interview

<http://sevenpillarsinstitute.org/journal/interviews>

Focus Group

<http://www.1888typeitup.com/focus-group-transcription-services/>

Thank you 1

https://www.ragan.com/Main/Articles/How_to_write_a_professional_thankyou_note_47053.aspx

Thank you 2

<https://www.peakgrantmaking.org/funders-thank-you-for-doing-these-12-awesome-things/>

Thank you 3

<http://jmgrants.com/funder-on-social-media/feed>

Thank you 4

<https://savvygrants.wordpress.com/2011/07/07/thank-you-letter-to-funders-be-kind-after-rejection/>



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