

Harmonising Reporting: Making reporting more useful

About Harmonising Reporting

Harmonising Reporting is a set of simple steps, tips and good practice to make reporting less burdensome and more useful for funders and funded organisations.

This paper summarises Harmonising Reporting's **key messages**. The full report is on Scotland Funders' Forum and Evaluation Support Scotland websites.

Harmonising Reporting was written by funders for funders¹. Since its publication, many funders have used it to improve their reporting practice.

Harmonising Reporting does not advocate one single report for all funders. One size does not always fit all. But if funders apply some simple and practical solutions they get better reports. Funded organisations find reporting less onerous and see that funders are more joined up.

Summary of Harmonising Reporting key messages

Relationships matter: when funders and funded organisations communicate clearly and understand each other, reports are better.

- *Harmonising Reporting* includes guidance (page 22) on how to build a **good reporting relationship**. For funders with capacity to meet funded organisations there's a **meeting note template** (page 25). The advice for funders is: *tell funded organisations what you need or you might not get it. Tell them how you use their reports.*
- There is guidance on how to encourage honesty from funded organisations about what has not gone well and why. The Scotland Funders' Forum leaflet "**What to do when things go wrong**" gives examples of funders and funded organisations working together to solve problems.

Reporting forms should combine **flexibility with clear guidance**.

- The *Harmonising Reporting template* (p30) covers the main things funders want in their reports. It has been successfully adapted by many funders.
- The advice for funders is: reporting requirements should take the form of clear guidance and a flexible structure of headings or simple expandable boxes. Funders' reporting approach should be flexible enough for organisations to tell the whole story of the funded work.

¹ Harmonising Reporting was written by a working group of funders, supported by Evaluation Support Scotland. It was published by the Scotland Funders' Forum in 2010 with the endorsement of the Scottish Government.

Most funders want broadly the same thing in reports. In a nutshell: **what did you do, what difference did you make and what did you learn.**

- Funders say that the best reports come from funded organisations that can evidence their work, tell their story and see reporting as an opportunity to reflect on achievement and learning.
- *Harmonising Reporting* offers **guidance on what type of activity and outcome** reporting would be most useful (page 28).
- Sometimes it is appropriate for more than one funder to receive the same report, for example if they are co-funding a specific project.

Minimise specialist or technical words and when funders use them, they should use them consistently and explain what they mean.

- *Harmonising Reporting's* **useful words** section (page 31) has advice on what to do and not do with jargon.
- Many funded organisations are used to setting and measuring **outcomes** so that is a useful word to use.

Organisations that **get support** to build their skills on monitoring, evaluation and reporting often report more effectively than those who have had no support.

- *Harmonising Reporting* includes advice on **supporting reporting** (page 33). Support is about good communication, such as a funder explaining their requirements clearly from the start. Support can also include referring to external or more specialised training or help.
- Some funders give their funded organisations the tips on **what makes a good report** (page 34 and also available as a separate leaflet).

Harmonising Reporting lists some things for funders to think about in relation to proportionate **financial reporting**. It refers to guidance from government and regulators. *Harmonising Reporting* identified financial reporting as an area where further work on improving consistency amongst funders might be needed.

For **case studies** of how funders use *Harmonising Reporting* please see Evaluation Support Scotland's website.

For a copy of the full report or advice about *Harmonising Reporting*:

Scotland Funders Forum: www.scotlandfundersforum.org.uk
info@scotlandfundersforum.org.uk 0141 242 1400 (secretariat at BIG)

Evaluation Support Scotland: www.evaluationsupportscotland.org.uk
info@evaluationsupportscotland.org.uk 0131 243 2770

ESS charity number is SC036529 and company number is SC284843