

Funders' online reporting systems – a reflection paper

Where did this paper come from and who is it for?

In the last few years, many funders have started using online systems for funded organisations to report on funded work. This means that when a report is due, funded organisations receive an email with a link to an online form to complete. They upload documents or fill in an online form or both. Some or all of this data and information may automatically feed into the funder's own database.

This paper is for funders that have, or are developing online reporting systems. It summarises reflections from a discussion session in January 2018 at which funders shared experiences of online reporting systems; the benefits and challenges.

How online reporting can help you:

1. Online reporting can cut down on administration time. For example:
 - Automated process for requesting and receiving reports
 - Prepopulating the report from funded organisations' applications or previous reports to remind them what they said they would deliver and report on
 - All information about funded organisations is in one place.
2. Online systems can make it easy to change reporting questions or tailor reporting requirements to different sizes of grant or different types of funding programme.
3. Systems can capture and aggregate numbers and financial information across funding programmes. Data that funders often aggregate includes:
 - Amount of funding awarded
 - Number of grants
 - Number of beneficiaries
 - Number of grants benefitting a particular beneficiary (such as older people or young people), a particular area of the country or by the funders' own themes
4. Some funders assess the quality of outcome reporting (excellent, good, fair, poor for example) and code this on their system. Then they can report on the proportion of funded organisations that for example, demonstrated excellent outcomes.
5. Some funders have a box on the system to tick when they read a report (or something within a report) that would make a good case study. This can also help save time, by making it more easily found in future.



Some questions you may have about online reporting

1. Can an online reporting system cope with qualitative evidence?

Online systems do not necessarily make it easier for funded organisations to **provide** qualitative outcome evidence (stories, case studies, quotes, photos and so on) or for funders to **analyse** qualitative evidence. Data limits can make it difficult to upload, for example, a video attachment.



Some funders are getting around this by using cloud-based file sharing systems for large attachments. You could download qualitative contents of reports into a spreadsheet for thematic analysis.

2. Where should I start: at application stage, assessment, reporting...?

It might seem logical to start with setting up online applications but it might be better to start with online reporting if that gives you the bigger win in terms of saving time and improving your own reporting.



When developing online systems, funders advise not to do everything at once but take a phased approach.



Online systems work best for funders when they have a good database with the right fields and flexibility. Setting that up takes thought and time and funders still need humans for some data entry and analysis.

Funders also might need in house IT expertise or a very flexible contractor (or both) to help them develop, use and modify online systems.

3. How can I help grantholders manage a new system?



Provide guidance for funded organisations on the technical aspects of online reporting. Funders could consider joint guidance if their systems are similar.



Ask for feedback from funded organisations on how the online system is for them.



4. Will I get better reports from funded organisations?

Not necessarily! The Scotland Funders' Forum [Harmonising Reporting](#) good practice is still relevant. See ESS website for more details.



Give feedback to funded organisations on their report and tell them what you will do with it. This improves future reporting.

What you could do now

Whatever stage you are at with online reporting, it's good to talk to other funders. Visit them and see their systems in action. Many funders use similar software and may have trouble-shooting tips to share.

If you use the same software as other funders, consider using a joint approach where possible, for example, in relation to the fields you are using, or any training or guidance in using the system.



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Life Changes Trust www.lifechangestrust.org.uk

Short Breaks Fund www.sharedcarescotland.org.uk/shortbreaksfund/betterbreaks

The People's Postcode Lottery www.postcodelottery.co.uk

The Robertson Trust www.therobertsontrust.org.uk

The RS Macdonald Charitable Trust www.rsmacdonald.com

Voluntary Action Fund www.voluntaryactionfund.org.uk/

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