Implementation Tips
for USAID Partners

Sharing Resources and Knowledge Among the Global CSO Community

Definitions

Indicator—A particular characteristic or dimension that will be used to measure change. Height is an example of an indicator.

Data—The actual measurement or factual information collected about an indicator. A measurement of someone's height at 5'7" tall is an example of a piece of data.

Baseline—Data collected about specific indicators before an intervention begins that will serve as the starting point against which to measure change.

Target—A specific, planned level of result for an indicator you expect to achieve within a defined period of time.

Unit Cost—The actual cost of your program divided by the actual number of targets reached. For example, a US$100,000 prevention program that reaches 1,000 people has a unit cost of US$100 per person reached.

Monitoring—Periodic tracking (for example, daily, weekly, monthly, quarterly, annually) of your project's progress by systematically gathering and analyzing data and information about what you are doing, whom you are reaching, and whether your activities are being implemented as planned.

Workplan—A document that lays out your planned activities, resources, and targets.

Reporting Project Progress and Results

Q. What are program reports and how do we prepare them?

A. Under the terms of your USAID award, you will need to produce program reports to describe how your project is progressing and compare actual results with the targets laid out in your workplan. Program reports may also be required by host country governments. If you have a multi-country award, you may need to provide separate reports to each country.

Ten Tips for Preparing Your Program Reports

The following are designed to help you develop the best program reports possible.

1. **Start by involving subrecipients and staff.**
    Writing program reports provides opportunities to talk to your staff and subrecipients about your program. To aid this process, provide subrecipients with a simplified reporting template and give them a deadline for submitting their contributions to the report. Gather your staff to discuss progress made over the reporting period. Be sure to allow sufficient time between the subrecipient's deadline and the submission date to consolidate and finalize your report.

2. **Do not surprise your Agreement Officer's Representative (AOR).**
    When your AOR reads your report, there should be no surprises. Ensure that your AOR is aware of any major changes that affect your budget or targets (such as changes in subrecipients, geographic location or key personnel) before they happen, since many require AOR and/or Agreement Officer approval. Do not wait to notify your AOR in the report. Your program report should document these changes and give updates on progress since these changes were put into place.

3. **Take the time to do an honest evaluation.**
   With many day-to-day demands, it is tempting to reduce the effort put into the report. When evaluating your progress over the reporting period, there will be successes and challenges. A good performance report provides a balanced look at the program, both in terms of progress as well as setbacks.

4. **Quantify your conclusions with data.**
   Although the bulk of your program report may be a narrative discussion of progress and setbacks, the core of your report is the data. You should be able to demonstrate the successes and challenges by looking at your data. This includes targets, financial performance, and the unit cost of a service (when applicable).

5. **Use your workplan and budget as baseline data sources**
   The data that are driving your report come from your monitoring and evaluation (M&E) system and your accounting system (to show actual costs). However, to measure performance you must compare these data to the targets you laid out in your workplan and workplan budget. This shows whether your program exceeded, met, or fell short of your expectations.

6. **Preview your next workplan.**
   Use the program report as a baseline for future activities. Challenges faced in the past year should be addressed in the next workplan. Preview various options your organization is planning in the next year to address these challenges.

7. **Link to the in-country Strategic Objectives.**
   Your program is not a stand-alone effort—you are working as a piece of a much larger effort in the country where you are implementing. Your program links to other programs through referrals, building the capacity of local CSOs, participating in technical working groups, and demonstrating and sharing your successes with other CSOs. Your report should not just look at the performance of your program, but also show how your activity is linking with and contributing to the wider program targets in your country.

For More Information

8. **Keep documentation for your final performance report.**
   Performance reports and workplans tend to make us overly focused on the yearly segments of our programs. Your program is an ongoing effort, however. Above and beyond meeting targets and staying within budget, your staff are constantly refining a program model to address the challenges of the communities where you work to be more effective, more sustainable, and more efficient. As you refine your model, document your activities. This helps you write your final performance report. It also provides guidance should you want to expand your model in the future or try to replicate it elsewhere. It will allow you to avoid making the same mistakes that may have occurred in the past.

9. **Be aware of in-country requirements.**
   As you plan for your report, be sure to keep in mind requirements and deadlines of host country governments, in addition to those of USAID.

10. **Share with subrecipients and staff.**
    You began this process by gathering input from subrecipients and your staff. Close the loop at the end of the process by sharing the final document with your team. Often, partners and staff become focused on their pieces of the puzzle. Sharing the overall program performance reports with everyone is an opportunity to keep your team engaged and focused on the bigger picture. Consider taking a few hours to share an overview of the report with staff including a preview of upcoming adjustments to be made in the coming year.

In Your Agreement

Typical USAID cooperative agreements list your program reporting requirements in Attachment A – Schedule, under section A.5.2.