



PHILANTHROPY
Australia

Corporate-Community Partnerships

A Philanthropy Australia Fact Sheet

Philanthropy Australia Inc

Level 10, 530 Collins St
Melbourne Victoria 3000
Australia

Tel (61 3) 9620 0200
Fax (61 3) 9620 0199

pa@philanthropy.org.au
www.philanthropy.org.au

Assn. No. A0014980 T
ABN 79 578 875 531

Reporting, Monitoring and Evaluating Corporate-Community Partnership Projects

This 'help-sheet' presents a simple 3-step model that will help you to map out your monitoring, evaluation and reporting of projects between corporations and nonprofit organisations. The model is meant to be worked through by all parties involved in a project together, so it also increases mutual understanding and you'll all be talking the same language.

When approaching these processes of reporting, monitoring and evaluation, it is useful to start by thinking ahead to your reporting and working backwards.

1. **Reporting:** Decide **who** needs to know **what** about the project, ie start with mapping out the proposed report from the perspectives of those at whom it is aimed.
2. **Monitoring:** decide what evidence will tell you what is working well, or not, and how you will collect this information
3. **Evaluating:** decide what will constitute evidence of your partnership's achievements, and difficulties in achieving its goals. Set out evaluation criteria.

A list of recommended 'Action Points' for each of these processes is presented in the following pages.

There are no one-size-fits-all solutions to reporting, evaluation or monitoring. In the rush to get a new project up and running these issues are often swept aside. But they are an integral part of your investment, and will provide returns in a sustainable program. The following model provides a series of recommended steps or action points, which will guide you through the pathways of implementing reporting, monitoring and evaluation processes.

Timing is important - setting up a simple but focused monitoring and evaluation regime right at the start of the project will assist your project management and will provide some of the evaluation and reporting information you will need. Providing regular progress reporting and a summary report to your stakeholders will enhance your ability to engage them, and others, for the benefit of this and future projects.

If you need advice, get it earlier rather than later. There are some excellent resources available on evaluation - see the Further Reading list for suggestions.

Above all, keep it simple and you'll get the best value for your investment.
And please feel free to ring us for some no-obligation advice.



David Morrissey
ARTD
(02) 9716 4500



Louise Arkles
Philanthropy Australia
(03) 9620 0200



1. Reporting

Reporting tells stakeholders what they need to know, so that they will support your endeavours. Integrity is important, so sometimes this may mean 'fessing up' to poor results or missed deadlines, as well as communicating positive results.

Stakeholders are those who have an interest in your outcomes, either internal (CEO, Board, marketing) or external (funders, lobby groups, members and supporters, public). Stakeholders are of varying importance to you, and their needs vary, so it is important to understand their perspectives.

Letting your stakeholders know what has happened and what the results are is a fundamental benefit which you **must** deliver if you want your projects to thrive. Reporting well and efficiently is a sound investment.

Action Points in Reporting

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| Stakeholder interests | List your important stakeholders: the readers of your reports. Ask what each needs to know so that they can continue to support you. Remember not all stakeholders are equal, or friendly. Include internal (CEO, Board, marketing people etc) as well as external (shareholders, special interest groups, community groups) and include your governance and accountability responsibilities |
| Map your report | Cross-check these stakeholder interests to create a list of the contents of your report. If it's too big, look to cut back on needs of less critical stakeholders. Give your report structure and allow a mix of stats and narrative, text and graphics. Decide now what medium you'll use, web, paper or both, as this will dictate volume and detail. |
| Review your information needs | <p>Looking across the topics for your report, check that you have or can get the information you need. This can be of three kinds:</p> <ul style="list-style-type: none"> • Descriptive of what you have done • Monitoring, ie. logging milestones or processes • Evaluative, ie. testing your results against goals <p>Do this in advance so that you have the information you need when the time comes. Sometimes this requires data collection from day one, see 'Monitoring'. Check out what information you or your organisation are already collecting and use this: duplication wastes time and erodes goodwill. Project feedback for monitoring and evaluation should provide most of what you need, but may not include benefits to the company.</p> |
| Collate your information | Gather your information – stats, story, graphics – under each topic and edit to balance detail and brevity, keeping in mind what your key readers will want. |
| Report | The process of reporting will include creating a report, or incorporating a project report into an annual or triple bottom line report, sustainability report, or a website. But reporting is also a relationship and you may have other means of telling your stakeholders what they need to know: briefings, seminars, functions, letters. And ask whether there are items from your report/s which they might like to use in their own reporting. |



Reporting Hints

- Reporting serves the function of helping stakeholders make the decisions to support what you are doing, so be clear you know what information will do that. If in doubt, ask them exactly what information they need to assist their decision making.
- Don't just write up what you have done and put it about. People don't have the time – or maybe the interest – to read everything. It is far better to tailor small reports to specific groups of readers than spend time on large or generic reports that are not read.
- Consider the needs of different media: internet, annual reports, sustainability reports, video or photo reports, presentations, and so on. Reporting can be more than just publishing a print report.

2. Monitoring

Monitoring is the systematic collection of information that tells you how well actions are being carried out and what is resulting from them. It helps management at a tactical level: *“Are we doing this thing right?”*

Monitoring is essentially about regular checks on the progress of your projects. Good monitoring also means you will have the information you need for reporting, evaluation and keeping stakeholders informed.

Action Points in Monitoring

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| <p>Decide what aspects of your project you will monitor and what information you need</p> | <p>Decide what aspects of your project and/or your partnership you need to keep tabs on: what aspects you need to report on and evaluate, which stakeholders are interested in what, and which data will tell you how well it is going? These can be inputs (dollars, time, resources) or outputs (immediate results) or impacts (longer term results). They might be about your company's role (eg. number of volunteer hours) or about your project (eg. number of trees planted) or about your partnership /project management (eg. records of project meetings and decisions). Your reporting and evaluation are important considerations when planning your monitoring . List what information you will need to collect to be able to report on and evaluate your projects.</p> |
| <p>Set up an information collection system</p> | <p>Check if someone is already collecting the information you need, and if so find ways for it to come to you. For the rest, talk to the people in the company who can provide you with the information you need and set up a system so that you have regular access to what you need, in the form you need it. Remember to keep it as simple as possible.</p> |
| <p>Analysis</p> | <p>What does the information you have gained from your monitoring tell you, compared to targets or expectations, previous results, across business units, across different categories, important ratios such as amount contributed compared to any leveraged contributions? Your analysis is essentially a check as to whether your project is working OK for you, your partners and other stakeholders.</p> |
| <p>Summarise progress</p> | <p>Monitoring can feed into, but is not the same as, reporting or evaluation. However it can be used to contribute to progress reporting to key people, internal to your company and partnerships.</p> |



Monitoring Hints

- Make sure your monitoring gives you the information you want both for progress checking and evaluation / reporting, so that you don't find yourself short of vital information later on.
- Keep it simple or it won't get done. Push it down to the coalface and make it part of – not additional to – the business of the project
- What gets counted tends to be what gets done, so beware of counting the wrong things – lower value activities - or you may bias people towards doing the wrong things

3. Evaluation

Evaluation is the assessment of the achievement of your purposes or goals, or unintended consequences. It addresses outcomes and governance at a strategic level: *“Are we doing the right things?”*

Four steps can see you provide much of the evaluation information you'll need to satisfy your stakeholders, especially if you have already scoped out your report.

Steps / Actions in Evaluation

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| Define what results you're seeking from your project | Your project will have goals, objectives or targets. If not, review it and decide what they really are. Cross check them with what you know your stakeholders want to see, so you have a definitive list of the results you are seeking. |
| Your key questions are...? | Given your desired results and your stakeholders' interests, decide what questions you need to answer to see whether your project has worked well: has been effective, has been well run, was the right project to run with in the first place. Did you achieve the desired results, or some other benefits? Include benefits to the company and the community. Did it run on time and budget? Were participants satisfied, and did they achieve their goals? |
| Gather the information you need | Each question needs certain information to be answered: it may be input from participants, numbers or dollars, or other peoples' views. It will probably include performance indicators that test whether your processes are working or your results are good. Lay out the information you need and the source of each. Some information could come from the same sources. From internal data, interviews, surveys... gather the information you need. This is where your monitoring really pays off! |
| Answer your questions and draw your conclusions | Based on the evidence above, set out the answers to your questions. Be able to defend those answers from the evidence. Interpret your evidence conservatively and honestly, acknowledging there will always be differences in interpretation. The summary of your answers, and your conclusions, form your evaluation, and could conclude as to whether you continue on the chosen path or diverge. |



Evaluation Hints

- Evaluation can be daunting, but will pay off in maintaining the quality of your projects and your partnerships. It's worth budgeting for as an investment in good practice.
- Link your monitoring, evaluation and reporting together to make sure each supports the other - more effective and more efficient.
- Start each project with an evaluation plan, showing what you will be doing and how. Let everyone concerned know this is happening and make sure they get the information they want and when they want it.
- Always ask 'where is the value to stakeholders?' and bias your resources in that direction.
- Focus on results: are we getting them, are they the right ones for this project and for stakeholders, are we missing anything? Remember, monitoring is about the process; evaluation is about the results.

Further Resources

Websites

For some great Australian reports:

Westpac

<http://www.westpac.com.au/internet/publish.nsf/Content/WI+Social+Impact+Report>

Insurance Australia Group (IAG)

<http://www.iag.com.au/pub/iag/sustainability/publications/index.shtml>

BHP Billiton

<http://hsecreport.bhpbilliton.com/>

Vicsuper

http://www.vicsuper.com.au/resources/documents/Sustainability_Report_20041.pdf

For wider examples and how-to information:

<http://www.innonet.org/>

Innovation Network (US) is a nonprofit organisation working to share planning and evaluation tools and know-how for non-profits and funders, with free online evaluation tools available for downloading.

<http://www.bitc.org.uk/resources/research/index.html>

Business In The Community (UK) has a Research and Evaluation page on their website, which includes their *Research In Review* publication and case studies.

www.globalreporting.org

The Global Reporting Initiative (GRI) is a framework for CSR reporting now supported as part of the UN Global Compact and a very useful broad base.



For organisations devoted to promoting good business–community practice:

www.partnerships.gov.au

The Prime Minister's Community Business Partnership has awards, good practice models and links.

www.ourcommunity.com.au

A website dedicated to providing resources and contacts particularly to non-profits

www.ethicalcorporation.com

A British magazine and internet source of almost too much information about global CSR, and has an email newsletter you can subscribe to for free.

Publications

Everyday evaluation on the run

by Yoland Wadsworth
Allen & Unwin, 1997

W.K. Kellogg Foundation evaluation handbook

published by the W.K. Kellogg Foundation, 1998

Monitoring and evaluation: a practical guide for grant-making trusts

by Des Palmer
Association of Charitable Foundations (UK), 1998