Monitoring and reporting

12 Principles of Proportionate Monitoring and Reporting

Principles for funders:

1. *Understand costs* Monitoring and reporting has a cost both for the funder and the recipient. Consider this when you design reporting requirements.

2. *Start early* Discuss monitoring and reporting requirements with potential funding recipients at an early stage.

3. *Specify requirements* Specify and indicate the scale of reporting requirements at the application or tender stage.

4. *Justify needs* To ensure that monitoring and reporting are proportionate to the level of funding and risk:
- Be able to justify why you need each piece of information
- Be clear how the funding fits with your strategic objectives
- Be clear how you will use the information

5. *Communicate clearly* Provide clear forms, using simple language. Where appropriate offer other ways to report back, such as face-to-face meetings.

6. *Give feedback* Feedback on reports helps people in the third sector to understand how you use their information. It also helps them learn and develop as an organisation.

7. *Use existing reports* Where possible, use existing reports, such as trustees' annual reports and the organisation's annual accounts. Encourage the recipients to use standard reports where appropriate, particularly if it is joint funded.

Principles for funded organisations:

8. *Understand why reporting is important* Reporting is essential to ensure that public funds are properly spent and have an impact, and reporting can help your organisation prove its worth.

9. *Identify useful information* If you understand what information is useful to your organisation, you can have a constructive discussion with your funders to agree realistic monitoring and reporting requirements. This discussion should include questioning the funder's requirements if you are not clear how it will use your information.

10. *Meet deadlines* Provide specified reporting information to the funder within agreed timescales.

11. *Co-ordinate* Make sure the person who is bidding for funding co-ordinates with the person who will project-manage the work, where relevant.

12. *Suggest using existing systems* Discuss with funders whether you could use a standard report based on your own reporting systems, especially if you can identify several funders who are likely to need similar information.