

# REPORTING PROGRESS



If you've read many of the topics covered in the **Plan** and **Construct** sections of this toolkit, you already know the importance of demonstrating the impact of your program to donors. They should receive regular communication about the ways in which their money is working. Although you have probably thanked, recognized, and utilized other methods of engagement, don't forget the **value of giving concrete facts and figures that show progress over time**. Donors should be able to see that your organization is not just a worthy cause, but that it works!

## Data

All organizations collect some level of data on the effectiveness of their services, so measurement results showing change should be fairly easy to access. The challenge can be determining which pieces of data are best to share and most clearly illustrate the positive outcomes. **Choose bright spots in your programs to periodically report to your donors**, keeping in mind that too many statistics or a lot of jargon might work against your goal.

While intuitively you will tend to focus reports on the improvements and effectiveness of your services, **transparency is a must**. If data indicates that some services are not working well or that there are areas needing adjustment, **do not** attempt to hide those facts or skew your results. It is best to be honest with donors about statistics that don't meet your standards, yet always accompany them with a clear plan for making changes to turn them around.

## Pictorials

**Sometimes showing positive change through photos or video is far more illustrative than just sending a report with numbers or text**. If you have clients who have been featured on your website previously, you might schedule a follow-up to show what great strides they've made since the first time they shared. Donors enjoy seeing the progression and knowing that your program makes lasting, continuous, and societal change.



## Formal vs. Informal

**It is wise to offer a mix of communication methods and different types of reports throughout the year.** You might highlight small developments in your monthly newsletter or post updates each week via Twitter, yet be sure that at least a few times per year you offer a more formal and polished set of information about progress toward goals. Organizations often try to time this with the onset of a new campaign or upcoming fundraising event, so they are ready to simultaneously inform the current supporters while attracting new ones. Creating a communications calendar can help your organization track communication with your donors and confirm it is balanced across methods and types.



## Comprehensive Reports

Not all donors will want to see the entirety of your yearly budgeting or the results of your financial audit, but **comprehensive and detailed information should be made available.** You might consider making annual grant reports accessible on your website or doing a yearly message to all donors with a link to download the documents if desired.

Some organizations choose to develop a specially designed Annual Report for Donors, merging pertinent information from their various grant reporting requirements, data collection on services, financial reviews, and personnel updates. This type of report usually highlights the fundraising efforts above all else, describing both successes and setbacks, and detailing a plan with clear goals and objectives for the next quarter or year.