

“USER GUIDE” for report template used for describing our work

The template below emerged to empower staff to set their own targets and manage their own performance yet remain within the boundaries of CSI objectives. The reporting tool simplifies the planning around the programmes, and also makes reporting on progress easier since operational performance can be linked directly to ABSA’s strategic objectives. As well as reduce the need for the director to manage staff, and increasing their ability to manage themselves and their programmes, the tool also makes reporting to the Board simpler and standardised. In turn, this reduces the time the Board needs to understand the programmes, and assess their strategic value and cost-effectiveness.

The reporting template is attached and this guide provided so that you can assess whether it is user-friendly and useful enough for your needs. The reporting tool should be seen as an executive summary, containing the important elements of the programmes. The “normal” report becomes an annexure containing more detail. The reporting tool is intended to replace the normal narrative so that preparation for the meeting is simpler and faster, with the normal narrative still available for deeper inspection.

Compared to the narrative formats, this format is tabular, simpler and the headings more structured, in order to:

1. Save time and effort for drafters AND readers
2. Ensure all programmes face the same standards of relevance and value
3. Link all activities directly to strategic objectives
4. Show the essential managerial elements of the programmes
5. Grow staff as managers of the “big picture”
6. Build programmes as self-contained and financially sustainable activities
7. Improve the measurement, hence the management and productivity, of programmes

The template itself follows, with descriptions which explain its components. Please use the descriptions when hearing or reading the actual report to assess whether the report is telling “the truth, the whole truth and nothing but the truth”.

Reporting Template

This table shows IF and WHAT strategic objectives are being satisfied by the programme. If a programme is NOT satisfying an objective, it needs to be refocused or wound down. If a programme is satisfying TOO MANY objectives, it may be overburdened and losing focus, and either resources must be added or it must be split up. If different programmes are chasing the same objective, there may be duplication and a programme needs to be refocused or wound down. Each programme needs to achieve some benefit directly, but may also have indirect benefits. The task of the programme manager is to achieve one objective in the most cost-effective way. The task of the Executive Director is to ensure that the portfolio of programmes achieves all of the objectives in the most cost-effective way.

Note that the objectives below are as restated – but only to clarify for the managers who the stakeholders are that they need to work for and with, what their key performance areas are, and to ensure that their performance is measurable. Note also that the 7 objectives have been summarised to the left of the table as “win donors value for money”. This again is to give the programme managers a common purpose that is tangible, and avoid having managers whose outputs and outcomes cannot be measured and thus not be managed.

The ticks are examples to demonstrate how a programme can achieve some objectives directly, some indirectly, and some not at all.

PROGRAMME NAME YEAR RESULTS			PROGRAMME BENEFIT		
			Direct	Indirect	None
Win donors best value for money	1	Objective 1	√		
	2	Objective 2		√	
	3	Objective 3	√		
	4	Objective 4	√		
	5	Objective 5			√
	6	Objective 6	√		
	7	Objective 7	√		

For every tick above, the manager needs to show what money was spent to achieve that benefit. This is to reflect the distribution of resources, and allow the board to assess whether that distribution is appropriate to achieve the objectives. The result of the table below and above is to give the board a means to directly assess the “cost-effectiveness” of the programme.

PROGRAMME NAME YEAR SPEND			PROGRAMME SPEND		
			Direct	Indirect	%
Win donors best value for money	1	Objective 1	R		X%
	2	Objective 2		R	X%
	3	Objective 3	R		X%
	4	Objective 4	R		X%
	5	Objective 5			
	6	Objective 6	R		X%
	7	Objective 7	R		X%

The above two tables give an “executive summary” of the programme. The table below does the same, but gives a 360 degree perspective of the programme. The programme is treated as a business, and the programme manager as the “Managing Director” of the business, who

must answer to all of the organisational aspects – Finance, HR, Marketing etc. In this way, the manager is empowered to take a big picture view, and hence to develop her / his thinking and management skills to the highest level. In addition, as the manager is empowered to take full-control, the need for the Executive Director to fill gaps is reduced.

<ol style="list-style-type: none"> 1. Objective 1 2. Objective 2 3. Objective 3 4. Objective 4 5. Objective 5 6. Objective 6 7. Objective 7 <p><i>Note also that whichever objectives were directly achieved by the programme are restated in the top row, to remind the drafter as to what to report on, and the reader what to assess on.</i></p>	<p>Measure of Success</p> <p><i>Here the drafter must give objective indicators so that actual performance can be quantified and assessed against end-goals</i></p>
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<p><u>How Benefit</u></p> <p><i>In this section, the drafter must show HOW the programme in summary achieves the strategic objectives</i></p>	<p>This Year: Next Year:</p> <p><i>Please note that the report combines the year past and the year ahead, so that the link between what did, what should, and what will happen is made clear, and more easily assessed by the board.</i></p>	<p><i>Here the drafter must give objective indicators so that actual performance can be quantified and assessed against end-goals</i></p>
<p><u>What Involved</u></p>	<p><i>Here the drafter gives a bullet list of the essential components of the programme ... e.g. workshops for Training, or website for Communication etc. This bulleted list is then expanded on below.</i></p>	
<p>Programme</p>	<p>This Year: Next Year:</p> <p><i>Here the drafter gives the theory of the activities, and shows the mental model of cause and effect being applied. Below, the drafter describes the practice (in the operations section), so this section allows the reader to assess whether the programme makes sense, and later on to assess whether the implementation looks good.</i></p>	
<p>Finance</p>	<p>This Year: Next Year:</p> <p><i>Here the drafter summarises on MONEY SPEND in the last and next years. If there were multiple objectives achieved, each objective's share of the total is shown. If there were multiple components of the programme, each component's share is shown. This is so the board can see how much money went where, and assess if this can stay or needs to change.</i></p>	
<p>HR</p>	<p>This Year: Next Year:</p> <p><i>Here the drafter summarises on PEOPLE DEPLOYED in the last and next years. If there were multiple objectives achieved, each objective's share of the total labour time is shown. If there</i></p>	

	<i>were multiple components of the programme, each component's share is shown. This is so the board can see how much effort and time went where, and assess if this can stay or needs to change.</i>	
Marketing	<p>This Year: Next Year:</p> <p><i>Here the drafter summarises on ACHIEVEMENTS REACHED/INTENDED in the last and next years. If there were multiple objectives achieved, each objective's share of the achievements is shown. If there were multiple components of the programme, each component's share is shown. This is so the board can see how many rewards came from where, and assess if this can stay or needs to change.</i></p>	<p><i>Achievements include: New income New members Committees attended Conferences launched Readers won Website visitors</i></p>
Operations	<p>This Year: Next Year:</p> <p><i>Here the drafter summarises on WHAT WORK HAPPENED/S in the last and next years. If there were multiple objectives achieved, each objective's share of the achievements is shown. If there were multiple components of the programme, each component's share is shown. This is so the board can see how much and what type of work was/is involved to produce the achievements and results, and assess if this can stay or needs to change.</i></p>	
Strategy	<p>This Year: Next Year:</p> <p><i>Here the drafter performs a SWOT analysis on each of the categories above. In this way, all the dimensions of the programme are considered, and the strengths, or weaknesses, or threats to, or opportunities, of each are identified. Having done so, the drafter can then present what was / will be done to harness those strengths in each, or repair the weaknesses, or avert the threats, or exploit the opportunities. As a result, the programme is assessed from all angles, and the manager and the board are empowered to assess all the risks to and value of the programme in the most scientific way.,</i></p>	

The report concludes with the same two tables of the start, but this time reflecting the objectives and budget for the year ahead. In THIS way, the intentions of the programme can be simply reported and quickly assessed. It may be that the ticks are not changed from the year before, but they may also change to reflect shifts in emphasis or focus. It may be that the amounts go up or down, to reflect changes in aggressiveness or scale. The aim of these two tables is to simplify reporting so that the programme's cost-effectiveness can be discussed and debated.

PROGRAMME NAME YEAR INTENDED RESULTS			PROGRAMME BENEFIT		
			Direct	Indirect	None
Win donors best value for	1	Objective 1	√		
	2	Objective 2		√	
	3	Objective 3	√		
	4	Objective 4	√		
	5	Objective 5			√

	6	Objective 6	√		
	7	Objective 7	√		

PROGRAMME NAME			PROGRAMME SPEND		
YEAR BUDGET SPEND			Direct	Indirect	%
Win donors best value for money	1	Objective 1	R		X%
	2	Objective 2		R	X%
	3	Objective 3	R		X%
	4	Objective 4	R		X%
	5	Objective 5			
	6	Objective 6	R		X%
	7	Objective 7	R		X%