

**Checklist for High-Quality Communications and Submissions to Donors**

*This checklist helps the CRS project manager (PM), others who prepare project documents, and reviewers of documents submitted to a donor to ensure the quality of the documents, particularly award deliverables. The checklist addresses issues ranging from basic document formatting and accuracy of content, to strategic considerations for CRS’ communication with donors via formally submitted documents*. *Reports are the most common deliverable and typically have the most narrative text, but the checklist can and should be used with other types of deliverables. These include financial reports, annual work plans/implementation plans, issues letter responses or other responses to donor questions, MEAL deliverables, branding/marking plans, and even proposals.*

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| **Good practices when preparing documents for submission to donors:*** Before you begin drafting a document, review any donor requirements and guidelines and the preparer’s checklist below.
* For award deliverables, think about how to use the document to show the donor that we are professional and responsive, AND tell a strong story about the project, its impact, and any learning the project has generated.
* Use donor deliverables, especially reports, to help the donor appreciate the impact of the project on people’s lives. Do this in a manner appropriate to the donor’s interests and style (e.g., brief testimonial about a technical change embraced, or a more detailed human-interest story or profile).
* Schedule the preparation and finalization of the document to allow sufficient time for a final review from the donor’s perspective.
* Try to anticipate and address any questions the donor may have.
* Review the checklist again after preparing the document, and submit along with the draft for next level review.
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 **Preparer’s checklist for COMMUNICATIONS AND submissions to donors**

**For any document submitted to a donor (reports, detailed implementation plans, etc.):** Format, readability, accuracy, branding, responsiveness

[ ]  I reviewed **donor feedback on the last report** **or other relevant deliverable** before preparing this document (if applicable)

[ ]  I followed the donor **template, format, or guidelines** (if provided) or CRS guidelines and templates

[ ]  I confirm that any **narrative in the document or deliverable** is presented in **short, clear paragraphs**

[ ]  I confirm that **all figures** (e.g., budgets, targets), **dates, plans**, and other project information noted in the document **reflect** the **current, approved** proposal, budget, and implementation plan, etc.

[ ]  I confirm that the document reflects **appropriate usage of donor terminology**

[ ]  I confirm that the document does **not contain CRS internal language and** acronyms, or overly **technical jargon** *(appropriateness of technical language may depend on the donor)*

[ ]  I have used **active voice** (“CRS’ technical advisor trained X on Y” **not** “X were trained on Y”)

[ ]  (For reports or annual plans) I confirm that document content is **not just copied, pasted, and slightly updated** from the last report/plan *(unless the donor requires such an approach)*

[ ]  I confirm that the document is **properly branded** per CRS and donor requirements

[ ]  I have **spell-checked** the document

[ ]  I have checked that the document is **properly formatted** for printing (including spreadsheets!)

**For project narrative reports (award deliverable):** Responsive, strategic communication

[ ]  I confirm that I reviewed project MEAL data and financials before writing the report narrative and that the **narrative includes analysis, not just a list of activities** completed with no information about impact and results (exception: initial, start-up-focused report, which may focus on activities conducted)

[ ]  In the report and/or cover e-mail or letter, I have **highlighted the 2-3 key messages that CRS wants to communicate**, and have substantiated or reinforced those points in multiple places (e.g., “This innovation is really showing promise as evidenced by MEAL data, which indicated…”)

[ ]  I confirm that the report **accurately represents project accomplishments and challenges encountered** (e.g., doesn’t over- or under-state them)

[ ]  When mentioning a **project challenge or issue**, I have explained how CRS resolved the issue (if resolved) or **how we are addressing it or plan to address it**

[ ]  I confirm that the report (or cover e-mail or letter) provides **sufficient contextual information** to help the donor appreciate the project’s scope (keeping in mind any donor template restrictions)

[ ]  I have included information to **help the donor understand interim progress** and small successes on the way to the larger objectives

 **Reviewer’s checklist for COMMUNICATIONS AND submissions to donors**

**For any document submitted to a donor (reports, detailed implementation plans, etc.):** Format, readability, accuracy, branding, responsiveness

[ ]  The document adequately **addresses any questions or concerns donors raised on previous submissions** of a similar deliverable (e.g., report, annual plan, terms of reference, etc.)

[ ]  The document **appropriately addresses any “hot-button” donor issues** or concerns

[ ]  The document (or accompanying e-mail) **provides adequate context** for a donor who does not have first-hand knowledge of the project operating environment

**For project narrative reports:** Responsive, strategic communication

[ ]  The report effectively references the last report and **shows progression**, without excessive repetition

[ ]  I can easily identify the **key messages** that the project team has chosen to highlight, in the report and any accompanying correspondence (e.g., cover e-mail)

[ ]  The **messages** highlighted in the document **are strategic** and consistent with CRS’ donor engagement plan for the project

[ ]  The report provides **clear follow up on the status of any risks or issues previously reported**, along with information on the **impact of implementing any changes or adjustments** discussed with or previously communicated to the donor

[ ]  The report **presents and properly frames** **substantive challenges and lessons learned** (including explaining why good planning may have been insufficient to help CRS avoid a specific challenge)

[ ]  The report **anticipates and addresses likely donor questions**

[ ]  Includes a response strategy or plan to develop such a strategy for any challenges cited

[ ]  Clarifies whether any underperformance reported could affect achievement of project targets and objectives

[ ]  Provides an explanation and context for unanticipated changes or events

[ ]  The report properly **highlights the impact of the donor’s support** (influence, leverage, replication)

 **Examples: Real-world reporting and donor feedback**

* **Example 1: Help the donor understand context and interim progress [**from CRS/Ecuador’s July 2014 quarterly performance report to the Department of State/Bureau of Population, Refugees, and Migration (PRM)]

*As a result of the training processes held with the teaching staff (see Table 8), the perception and understanding of the reality of children seeking international protection or asylum has changed in participating schools. For example, the project team has noted that there are now more teachers that are committed to providing protection for children who come into schools under these circumstances.*

***Part of the progress comes from implementing the Coexistence Leaders program*** *(see Table 9), resulting in an increase in the participation of committed boys and girls who are replicating exercises learned in the workshops and are generating integration spaces free of violence and discrimination with their classmates. The methodology has been validated and improved, to the point that other schools have demonstrated interest in applying it.*

***These successes underscore*** *the necessity of strengthening the capacities of educational authorities for achieving maximum impact for promoting integration in schools and communities. Similarly,* ***integration activities have a great impact*** *on parents, students and teachers by generating spaces to share, understand and join forces through games and sharing other traditional practices.*

**Here’s the State/PRM Program Officer’s feedback: “*Kudos on the Coexistence Leaders and new partnerships successes!”***

* **Example 2: Help the donor understand how CRS will meet targets [**a Department of State Office to Monitor and Combat Trafficking in Persons (J/TIP) question about Albania’s January - March 2015 report]

State/JTIP comment:

*Based on the approved timeline, some activities (e.g., study tour/dialogue with Kosovo and Montenegro, development of training modules) are behind schedule.* ***Does the project team assess that it will be able to complete all objectives/activities by the end of the project period?***

CRS’ response:

*The activities identified above are occurring during the current quarter. The first draft of the curriculum has been submitted and will be finalized by mid-June. Details regarding the study visits are described below. At this time, CRS foresees that all activities will be completed by the end of the project period.*

**CRS responded appropriately to the donor’s question, but should have anticipated and addressed this question in the original report.**

* **Example 3: Explaining why a challenge occurred and how CRS resolved or mitigated its effects (**from aState/PRM Program Officer regarding a quarterly program report):

State/PRM comment:

*Newly hired staff – it appears like a significant staff increase in 2Q of the project?  Are these all new positions?*

CRS’ response:

*The new positions for quarter 2 are for the eight promoters who will facilitate the women’s self-help* groups (*these have been planned since beginning of the project). During Q2, there has been significant staff turnover*. *In all, 12 people left the project and these positions will be replaced.*

**Our response answered the Program Officer’s question. However, it begged a new question, which we should have anticipated and addressed**:

*It would be helpful to find out the team’s thinking of why there was such a significant turnover in the second quarter.*