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“I’m not sure anyone reads our reports. They say they’ll let us know if they have questions, but we never get feedback.”

INSIGHT

Reporting and metrics are not always perceived as useful and valuable to grantees.

Co-designing metrics and reporting formats to be specific to the needs of the grantee can lead to more meaningful and valuable impact measurement for both funders and grantees.

“We appreciate the freedom to write the narrative report we think is most helpful.”

“[GCE] taught us to think about impact.”

“We made an ethical decision to not meet our metric.”

Insights

REPORTING PROCESSES

In the best case, quarterly and annual reports serve as much more than just an update or checkup. Reporting can be an integral part of creating a common understanding of the organization’s goals and core mission. Some participants stated that creating reports helped them hone their organizational focus.

But in other cases, reporting was seen as busy work that takes time away from what organizations saw as their “real work.” These participants viewed the report as a deliverable external to their organizational goals. This group also expressed doubts about the utility of their reports to GCE, since they rarely heard feedback after submitting reports.

Among the people who were the most satisfied with reports, many of them had negotiated a reporting format that worked for them. For example, some organizations sent one standardized report to all of their funders, so they didn’t have to spend time preparing multiple reports. Others worked with GCE to develop a specific format that best fit both their needs and GCE’s. We noticed that the organizations who took the initiative to make reporting work well for them were more likely to see the real outcome as not the report itself, but as a benefit to their organization’s health. On average, organizations reported that narrative reports are more cumbersome to produce than financial reports, but almost all respondents felt narrative reports were a clearer reflection of the organization.

“The reporting burden has been by far the most negative aspect of the relationship with the GCE team... at the moment, the reporting requirements are onerous and do not support meaningful organizational monitoring, evaluation and learning.”

METRICS & BENCHMARKS

When we explored the topic of reporting with interviewees, the conversation often turned to the metrics that are, for organizations, tightly linked with reporting.

Most organizations had experience with impact measurement of some kind, though sometimes at a less rigorous level than GCE's standards. As with reporting formats, participants who pushed back on initial metrics, and as a result collaborated to create metrics they found more meaningful and useful, were the most satisfied and positive about their metrics. The chance to create impact metrics together with GCE was described as a helpful learning experience. In particular, some participants noted the value of being exposed to learning measurement techniques associated with the commercial sector.

The negative comments about metrics came from participants who felt that metrics were handed to them without opportunities for discussion and revision, and thus were neither reasonable nor applicable to their strategy and impact model. One participant noted that they were “burdened with measurable but unfair metrics and expectations.” Another commented that meeting metrics would only be possible if they behaved unethically. These organizations generally saw metrics as a way to quantitatively describe outputs, rather than a way to monitor outcomes.

THEMES

- > Funding Approach & Process
- > Assessing Impact

Recommendations

Reporting and metrics are important practices, but there is room for improvement in how they are implemented. Some recommendations include:

- Invite grantees to propose metrics or impact measurement frameworks that best reflect their strategy, impact model, and desired outcomes.
- Give sufficient time to develop an impact measurement framework that a grantee is comfortable with, e.g., consider allocating time at the beginning of a grant term to dedicate to working on co-designing indicators that are outcome-driven and aligned with the grantee organization's strategy.
- Where possible, align metrics with organizations' existing frameworks for monitoring, evaluation, and learning (MEL), and where organizations lack a coherent MEL framework, consider offering support in building out MEL within the organization (as part of the grant or in the form of portfolio support).
- Where possible, identify an opportunity to sync impact measurement across co-funders to alleviate the burden on grantees.
- Be explicit about the purpose of grant reporting and where possible offer guidance and options around formats.
- Proactively talk with grantees about how reporting can better fit into their existing workflow and improve their organizational health.
- Create processes for gathering and incorporating organizational feedback on metrics over the course of the funding period and offer flexibility with how metrics are structured and used.
- Provide timely feedback on reports provided by grantees.