



Planning and Evaluation Wizard

step-by-step project planning and report writing for primary health care

Developing reports - include in funder report

The following steps provide a guide to the writing process:

1. Clarify Purpose & Expectations

Be clear about purpose, audience(s), resources to support report production, roles and responsibilities. Make sure this understanding is shared by other key people involved.

2. Decide on appropriate structure for report

Usually funders will have a specific pro forma they would like you to follow. It's worth being familiar with this well before you start writing the report. This way you can be on the look out for what to include as your project progresses. If you have no proforma provided, you will need to choose some appropriate headings as a guide.

3. Produce 1st draft

Get it all down, worry about editing, length, style etc. later. Cut and paste from previous progress reports and evaluation plans etc. Leave gaps for others to fill in if necessary.

4. Re-draft

Read and edit 1st draft, trying to read it from the perspective of a key person you would like the report to influence, or a member of your audience.

5. Circulate

Circulate the draft to the project team or advisory committee if appropriate. Ask for written comments and ideas for recommendations by a fixed date, allowing readers enough time to do so. Be specific about what aspects you would like feedback about, eg. content, specific sections you are unsure about, style, tone, language, flow, recommendations, layout, typos, grammar. If you have only a few people and enough time, circulate just one copy for all comments, so as to make editing easier.

6. Integrate Comments, Develop Recommendations

Decide which comments to incorporate, preferably in a small project team meeting. Discuss recommendations. If your recommendations involve others taking action, it may be advisable to involve these people in the process. This can help make sure they are drafted in a way that is most likely to be well received, and acted upon. It is important to put the most important recommendations first. It can also be helpful to sort your recommendations according to who you would like to be taking action. This way they have quick and clear access to the implications for them.

7. Write Executive Summary

This is a VERY important part of your project report. Executive summaries are the most used source of information about project outcomes. It is necessary to keep the executive summary short, preferably 1-4 pages. It is useful to contain a brief summary of the project purpose, key strategies, findings of relevance to the audience. Make clear the implications of the findings, possibly including the recommendations as part of the executive summary, or following just after it.

8. Circulate Final Draft

Include: acknowledgements, title page, contents page, Executive Summary, recommendations, references, lists of acronyms, appendices (eg. any questionnaires used, background info examples of publicity, etc.)

9. Do final Edits

10. Layout

11. Obtain ISBN Number

If your report is to be a public document. This can be done via the Department of Health Library. They will require details of author, publisher, date, keywords, and a copy of the draft report.

12. Print and Distribute

13. Launch with Celebration!



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