Common "8+3" Template

Instructions for donors: [Delete in final version of this template]
You can use this Common "8+3" Template to develop your own harmonized reporting form. You can use the same developed reporting form for both final and interim (or progress) reporting, or you can have the same reporting form for both, depending on how you want to use this template. If a separate interim template is developed, it is recommended that it contain fewer questions, and a shorter word count than the final.

*Instructions about how to adapt each part of the template (**Basic Information, Core 8 Questions, Additional 3 Mandatory Questions**) are below. These instructions should be deleted. The headers themselves ("Basic Information", "Core 8 Questions", and "Additional 3 Mandatory Questions") can also be deleted.*

*There is a final section that "**Feedback for the Pilot**" that should not be deleted or altered in any way. This is to enable GPPi to collect feedback used to evaluate the pilot and the template concurrent with the period when reporting occurred (particularly relevant for questions of how long it took, for example).*

Contact GPPi (HarmonizingReporting@gppi.net) at if you have technical questions about any of the above. Do not forget to forward on any reporting you receive that meets the criteria for this pilot to GPPi.

Basic Information

Instructions for donors (to be deleted in final form sent to implementing partners): This section includes the identifying information to the project. Slight modifications to this standard information section are possible if necessary to clearly identify the project within your project tracking system or processes. For example, a place to list the project number, project area, or responsible division could be added. Please do not delete the notice of consent, but you may add a line noting that your country/division is participating in the pilot for applicants in the state country, if desired.

Name of Partner:
Project Name (or number, where applicable):
Project Country:
Project Area (if applicable):
Reporting Period:
Project Start Date:
Project Planned End Date:
Total Project Budget:

Notice of Consent: *This reporting form is being used as part of a pilot project led by the Grand Bargain work stream on harmonizing and streamlining reporting processes. The pilot will test the benefits to donors and partners of using a common reporting format and template.*

To evaluate the results of the pilot, a research organization, the Global Public Policy institute (GPPi), has been commissioned to collect reports based on the common template that fall within the scope of the pilot. Analysis of the reports will inform the final conclusions and evaluation of the pilot. However, neither the overall content, nor the name of the organization, nor specific excerpts of the reports will be shared with others, appear publicly, nor be used for any other purpose other than contributing to an analysis of the pilot results.

Core 8 Questions

Instructions for donors (to be deleted in final form sent to implementing partners): This section includes the 8 core questions that all donors participating in this pilot will be applying. You can always ask fewer than these 8 questions, if they are not required for your reporting, by deleting questions not necessary for your reporting.

As a rule, donors should try not to alter the question language or the guidance in each question, as this would undermine harmonization. However, in a few places, this template was designed to allow for slight variance between donors and you may want to clarify for reporting partners your expectations for these questions alone by adjusting the Additional guidance language as follows:

- *Question 3: It is strongly encouraged for donors use the sample logframe or indicator tracking table, offered in question 3 below, or one that is as close as possible to the version below, as this will increase the harmonizing role of this pilot. Where a program or project has clearly identified specific project components in terms of sector, geography, or time period, the logframe may be broken down by these components, as indicated in the project proposal. An end goal of the project will be to have an agreed-upon logframe. However, where it is not immediately possible to use this logframe, or a version of it, because a different logframe was already agreed upon, then donors should indicate to reporting partners that they should use the logframe or indicator tracking table agreed upon in the project proposal. If no logframe is required, and only a narrative reporting of progress against benchmarks or objectives is required for your reporting standards, then delete the proposed logframe and indicate to reporting organizations that only narrative reporting is required.*
- *Question 4: Similar to the logframe issue, and end goal of this project will be to have relatively harmonized expectations among donors on reporting the quantity of affected persons who are reached by the intervention (often referred to as a "beneficiary" table or summary). A sample beneficiary table is included, but it may be modified depending on the project and donor. Where a program or project has clearly identified specific project components in terms of sector, geography, or time period, affected persons may be broken down by these components, as indicated in the project proposal. Alternately any table or formats specified in the proposal may be used instead of the sample table (although this is discouraged for this pilot, as it would reduce harmonization).*
- *Question 7: The question on the exit strategy should be asked only where this template is used to generate a final report form (not an interim or progress report). In addition, the question guidance indicates that for some donors, part of answering this exit question may require a catalogue or inventory of any equipment, capital goods, or other assets that were acquired through project funds, and how they will be transferred, disposed of, or otherwise dealt with upon closure of the project. Indicate to partners whether you consider this to be required for question 7, and any required standards or rules for doing so.*

The suggested word count for these 8 questions is 5 to 10 pages, and there are suggested limits under many of the questions). You may offer a different suggested word count or length per question or for the final form as a whole.

1. **Overall Performance**: Provide a discussion of the overall performance and results of the project to date, with reference generally to the objectives of the project. Specifically note the project's impact on the different needs of women, men, boys, girls, and vulnerable individuals. (Suggested length: 1/2 page to 1 page)

> *Additional guidance to Partners (Delete these instructions in final submission): Provide a narrative summary of the overall performance, describing briefly how progress has been realized over the course of the project, and/or since the last interim report (where required). This question can be used to highlight important achievements, significant constraints or challenges encountered, or other elements or factors that have been significant to the project results or implementation. Performance should be discussed in relation to the overall context or needs, and original purpose or objective(s) of the project.*
>
> *Within the general discussion of performance, particular attention should be given to how the needs of vulnerable communities and individuals were identified and how these needs were met or taken into account. Explain how gender considerations were taken into consideration in this project, and how they were mainstreamed in project implementation. Highlight any challenges or concerns related to the needs of women, men, boys, girls, and vulnerable individuals that arose, and how they were dealt with.*

> *To distinguish the appropriate response here from the question on "Measuring Results", this question should focus more on the overall narrative of the project – successes and failures – within the context of the project's overall purpose and objectives (as set in the initial proposal). The "Measuring Results" question should be used for more detailed reporting against the logframe or benchmarks or milestones of the project.*
>
> *Where used for interim reporting, this question should provide only a brief discussion of all elements, and the discussion might also include the outlook for future performance.*

2. **Changes and Amendments**: Briefly explain any changes or amendments in the project from the original project plan (whether in implementation plan, activities, indicators, or outcomes), and contextualize them by describing what changes in needs or in the overall situation, or other factors required these changes. (Suggested length: 1/2 page to 1 page)

> *Additional guidance to Partners (Delete these instructions in final submission): Explain any changes, deviations or amendments from the original proposal or project plan, and the circumstances or factors that prompted them. This might include a discussion of how the humanitarian context has changed, changes in the needs of the beneficiaries, or other challenges or constraints encountered that required adapting the implementation plan, activities, indicators, or outcomes. Note specifically where a modification from the original plan was requested and approved by the donor.*
>
> *For interim reporting, provide recommendations for improving the design of the program or adapting the program to address these changes, including any alterations to program goals, implementation plan, specific activities, indicators or proposed outcomes. For final reporting, describe the adjustments that were made given the change in circumstances, and how these affected achievement or change of the objectives or milestones established in the original proposal.*

3. **Measuring Results**: Describe the progress in achieving the outputs, outcomes and associated targets in the project proposal, according to the benchmarks, milestones, or indicators that were established. Where a logframe is required, the following logframe (sometimes described as an indicator tracking table) is recommended. Alternately, the logframe or indicator tracking table provided in the original proposal may be used.

> *Additional guidance to Partners (Delete these instructions in final submission): Describe the outputs, outcomes, or results achieved, assessing progress against the targets identified for each indicator in the original proposal. Specifically note whether targets were met within intended timeframe, and provide an explanation where key targets or milestones were not met, and any discrepancies between expected and actual results.*
>
> *Note the sources of measurement and verification used. For final reports, attach any monitoring and evaluation assessments taken to the final report.*
>
> *As a default, implementing partners should provide an assessment of the results for each objective or outcome set out in the original performance plan, in both narrative and logframe form, although some donors may require only a logframe or only a narrative description. When only narrative reporting is required, it is helpful to organize the description of progress by the specific objectives or outcomes established in the project proposal.*
>
> *A suggested logframe or indicator tracking table is below. Where a program or project has clearly identified specific project components in terms of sector, geography, or time period, the logframe may be broken down by these components, as indicated in the project proposal.*

Level of Results	Indicator(s)	Baseline (with date)	Targets and Milestones	Progress/ Achievement to date	Explanation of Variance	Source/Method of Verification
Outcome(s)						
Output(s)						

4. **Affected Persons**: Provide the number of those taking part in or affected by the project or relevant part of the program, disaggregated by gender, age, and other guidance specified in the proposal. The best practice standard is to provide this information in quantitative, tabular form. A suggested table is provided below, but the table provided in the proposal may alternately be used.

Additional guidance to Partners (Delete these instructions in final submission): Provide the number of persons reached by the project to date, disaggregating by gender & age (infants less than 5, children less than 18, adults between 19 and 49 years, and elderly over 50), as well as any particular categories of vulnerable individuals or specifically targeted individuals identified in the proposal (note: this may vary based on the nature of the proposal). Unless otherwise specified in the proposal, quantitative information should be presumed for this question. Include both the targeted and actual number of persons reached.

Where interim reporting is required in the project, each report should describe both the number of persons reached in the reporting period in question and the cumulative number reached so far. Where a program or project has clearly identified specific project components in terms of sector, geography, or time period, affected persons may be broken down by these components, as indicated in the project proposal.

Note: "Affected persons" have often been described in past donor reporting templates as requiring the number of "beneficiaries." In consideration of ongoing discussions about greater accountability toward and inclusion of the affected population, the term "beneficiaries" is instead framed here as "affected persons," but implies the same level of reporting as in past "beneficiary" reporting.

Location/Activity/Objective (where relevant)*						
Unit of measurement (choose one): Individual / Household (HH) / Organization / Community						
Age Group	Male		Female		Total	
	#	%	#	%	#	%
< 5		--%		--%		--%
< 18		--%		--%		--%
18-49		--%		--%		--%
50 and >		--%		--%		--%
Total		**--%**		**--%**		**100%**
Planned		**--%**		**--%**		**100%**
Variance	**--%**		**--%**		**--%**	

* For many projects, it may be more relevant to present the number and percentage of affected persons per location, per objective, or, where multiple activities are included per project, per activity. Where this is the case, separate tables may be included, with the location or activity specified at the top of each breakdown.

5. **Participation of and Accountability to the Affected Population**: Describe how the project has been designed to maximize accountability toward the affected population. (Suggested length: 1/2 page)

Additional guidance to Partners (Delete these instructions in final submission): How have you provided information about the organization and the project to affected populations? How have you ensured that this information is timely and accessible to all? How were crisis-affected people (including vulnerable and marginalized groups) involved in the design and implementation of the project? How did you use their views to guide decision-making? How was feedback collected, tracked, analyzed and incorporated? Were adjustments necessary as a result of received feedback? If so, how were they undertaken? Please provide some evidence of soliciting and using this feedback (e.g. tools for provision of information, or tracking systems).

6. **Risk Management**: Describe how risks to project/program implementation were identified, managed, and mitigated, including any operational, security, financial, personnel management or other relevant risks. (Suggested length: 1/2 page)

Additional guidance to Partners (Delete these instructions in final submission): Partners should provide an update to the risk management analysis included in the initial proposal. Were the right risks identified? What new risks arose that were not anticipated? For any risks identified, what strategies or measures were taken to mitigate or address these risks? Did mitigation measures work?

This should include both external risks stemming from the overall environment, and internal risks, for example, related to financial or personnel management issues. This might include risks of corruption, conflicts of interest, loss or harm to project staff, loss or harm to project materials or resources, among other risks. For projects taking place in insecure environments, specific attention must be given to security risks, including how the security situation evolved over the course of the project and how this affected project activities.

7. **Exit Strategy and Sustainability:** Briefly describe the exit strategy and closure steps for the project or program, and an assessment of the sustainability of the results.

Additional guidance to Partners (Delete these instructions in final submission): Briefly discuss the exit strategy for closing the project, and an analysis of the likely after-effects of the project. Most prominently, this analysis should focus on the sustainability of the project, or the extent to which any of the results or benefits of the project will continue after its closure.

Additional consideration can be given to how the project contributed to the resilience of communities, or how it has supported the capacity of local partners. This is particularly important where these elements were a prominent component of the project proposal.

In some project contexts, it may also be appropriate to discuss ways that elements of the project will continue, or will feed into other long-term recovery, rehabilitation or development efforts. For example, did the project take opportunities to support long term strategies to reduce humanitarian needs, underlying vulnerability and risks?

Finally, depending on financial regulations, some donors may also require a catalogue or inventory of any equipment, capital goods, or other assets that were acquired through project funds, and how they will be transferred, disposed of, or otherwise dealt with upon closure of the project.

8. **Lessons Learned**: Describe any lessons learned, and how these will be applied in future projects or programs. (Suggested length: 1/2 to 1 page)

Additional 3 Mandatory Questions (the "+3")

Instructions for donors (to be deleted in final form sent to implementing partners): This section includes the up to 3 additional core questions all donors can choose to include in addition to the above 8 questions. Once you choose these three questions, they are <u>mandatory</u> for implementing partners to answer. Also delete the "Additional 3 Mandatory Questions" title above, to ensure that it is clear to implementing partners that these are not optional.

Note that question 13 on Activities or Steps toward Implementation is recommended for use in Interim reporting versions of this template, rather than in the final reporting form.

9. **Value for Money/Cost Effectiveness**: Assess the value for money or cost effectiveness of the action.

10. **Visibility**: Describe how the support for this project was made public. Explain where any visibility or acknowledgement plans outlined in the proposal were not conducted, and alternative steps taken to comply with visibility obligations.

11. **Coordination**: Describe the impact of any coordination efforts, any synergies that developed, and recommendations for improving coordination in the future.

> *example, any synergies that developed with other projects, or any other benefits brought about through the coordination. Are there ways that coordination might have been better, or might have improved the project outcomes?*

12. **Implementing Partners:** List any implementing partners for this project and assess their role and contribution.

> *Additional guidance to Partners (Delete these instructions in final submission): List the implementing partners or subcontractors for this project, and describe the role they played in implementation. Assess the quality of their participation or contribution. Where local partners were engaged, comment on any specific examples of additional value added of working with local partners. Describe any efforts to improve implementing partners' capacity or ability to work on similar projects in the future. Were there ways that the project could have been better structured to improve engagement with or implementation through implementing partners?*

13. **Activities or steps toward implementation**: Briefly describe the implementation steps so far, the activities that have been conducted, and the management arrangements put in place to ensure project implementation.

> *Additional guidance to Partners (Delete these instructions in final submission): Describe how the project activities have been implemented so far, including the management and implementation arrangements put into place, and how these were coordinated with other subpartners or actors. Note any changes in the activities or implementation plan so far and any planned changes going forward.*

14. **Environment**: Give a brief account of how environmental issues were addressed and the project's impact on the environment.

> *Additional guidance to Partners (Delete these instructions in final submission): Describe how environmental or climate issues were addressed. What measure were taken to ensure that the environment was protected and to manage risks to the environment? What environmental guidelines or policies were taken into account? If the project produced positive outcomes for the environment, for climate sustainability, or better future resilience against natural disasters, these should be described here.*

Feedback for the Pilot

This short feedback survey is designed to help those managing the common reporting pilot evaluate how well it is working, how it affects the overall reporting process, and to collect concerns or feedback about the template itself. These will be used to evaluate the overall pilot success, to develop suggestions for modifying the template or other aspects of the pilot, and to develop future recommendations for the harmonizing and streamlining reporting workstream. It is important to fill these out at the same time that partners finalize this reporting form, and submit these questions with their final report, to the donor. If, for reasons of confidentiality, partners do not wish to fully answer these question in the same form as their donor report, they may send a copy of their answers to HarmonizingReporting@gppi.net.

1. How long did this report take you to develop material for and fill out (excluding these pilot questions)? Was that roughly the same, more, or less than other reporting?

2. Have you also had to submit reporting on this common template to other donors? Which? Was it beneficial to have a similar template?

3. Were there questions that you found less useful than others in capturing project impact, or important humanitarian elements? Were there questions you would have added?

4. Were there other reporting steps required for this project other than this reporting template, for example additional supporting documentation requests, requests for additional reports or updates by donors, or other?