This review details the experiences with and results of the “Harmonizing Reporting Pilot” up to its mid-point. The Harmonizing Reporting Pilot is an international reform pilot which seeks to simplify the reporting of humanitarian activities by testing a standardized template. Supported by 12 donors and 23 partners across three pilot countries (Iraq, Myanmar and Somalia), it is the first time such a system-wide reform takes place. The initial results are encouraging: the new template is appreciated for its accessible language and one third of users feels it saves time. Yet the review also shows areas for improvement: the new standardized template is not as widely used as it could be and the initial “one-size-fits-all” approach has its limits. As a result, adjustments to the template and further guidance on how to use it are necessary.
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Executive Summary

At the World Humanitarian Summit in May 2016, humanitarian actors committed to the “Grand Bargain,” a sector-wide reform to improve the effectiveness and efficiency of humanitarian action. One of the Grand Bargain’s priorities is to harmonize and simplify reporting requirements to donors so that it becomes simpler, more efficient, and less bureaucratic. To work toward this commitment, a group of donors and partners agreed to pilot a new reporting template in Iraq, Myanmar and Somalia from June 2017 onwards. The new reporting template, called “8+3 template” because of the number of questions it asks, seeks to establish a standardized and simplified approach to project reporting. Employing a single, easy-to-use template across donors promises a lighter workload for partners and local staff involved in reporting. It is the first time such a reform on simplifying reporting takes place.

This review assesses the benefits and drawbacks of the 8+3 template as well as its effects on simplifying and harmonizing donor reporting at the mid-point of the pilot. It is based on more than 30 interviews with pilot participants and other experts on reporting, as well as an analysis of standardized feedback given on 183 reports using the 8+3 template. While the initial results are encouraging, the evidence collected so far can only show tendencies and does not allow for a conclusive assessment of the 8+3 template or the pilot itself. This is left for the final review of the pilot in June 2019.

Initial Results

Template users value the simplification in language: At this point, feedback on the 8+3 template is generally positive and most pilot participants find both the questions suggested in the 8+3 template and the additional guidance well-worded and easy to follow. Interviewees further stressed that the simplified template is particularly beneficial to local staff or local partners who are oftentimes at the frontline of project report preparation. Questions and the guidance offered are easier to understand for non-native English speakers.

The 8+3 template saves time: The majority of those who have used a version of the 8+3 template not only appreciate the simplified language but also suggest that completing a report based on the 8+3 template has taken them equal (46%) or less time (30%), compared to the old reporting format of the same donor.

It is too early to find evidence of a positive harmonization effect: At this point, it is not possible to determine the harmonization effects of the 8+3 template because too few partners had received versions of the 8+3 template from different donors. Too little data exists to make a credible assessment. However, many interviewees predict a number of potential benefits if a single template is used across multiple donors. These benefits include, among others, more clarity on donor information needs, less need for training on individual donor requirements, and easier learning across projects both for donors and partners.
Limitations of the 8+3 Template

Despite the generally positive views on the 8+3 template, partners have pointed out a number of limitations and problems. Beyond feedback particular to individual donor templates, two larger issues stand out: First, there was criticism regarding the suitability of certain questions, the order of questions, and the level of detail suggested by the 8+3 template. Second, template users partly questioned the appropriateness of the template for different types of projects or programs. Regarding short-term projects with a duration of up to six months, users felt that the 8+3 reporting template is too detailed. Other users found the template to be too “project-oriented” for longer-term framework programs that often report more broadly about activities and impact and try to give a big picture. This feedback shows the skepticism and reservations of aid organizations about the viability of a single template for activities ranging from short-term and rapid onset projects to longer-term programs.

Recommendations

Based on the feedback collected, this review makes a number of recommendations to strengthen the pilot and improve the 8+3 template. Most critical for a successful pilot is a broad and consistent uptake of the 8+3 template by all the donors and partners that committed to the pilot. It is the responsibility of participating donors to reflect on their pilot engagement and ensure that there is no gap between commitments made and changes to the reporting practice. Donors and partners should also jointly seek to maximize the number of eligible projects in each pilot country by periodically reviewing which projects should be included in the pilot. It is the co-convenors’ responsibility to remind the pilot participants about their commitments and ensure any help is provided so that the donors and partners honor their commitments. More specific communication around the pilot is also necessary.

Donors who have already developed their templates based on the 8+3 standard should take note of the feedback this review provided on their template separately. In some instances, adjustments are necessary. Critical in this regard is the similarity of the question wording to the original 8+3 template. Much of the potential of simplification and harmonization is lost when donors make even slight changes to the question wording. Donors should review their templates against the original 8+3 template and seek to match the wording. Finally, template users wish for more flexibility on report length and the level of detail.

Beyond this, the review points out a number of more general recommendations concerning the template. These include the need to further simplify the template language and edit the template with non-native English speakers as the primary users in mind. In addition to simplifying language, the co-convenors should ensure that further template guidance is developed that informs pilot participants on how to apply the template for different types of projects and programs. An additional cash question — developed in close collaboration with the Grand Bargain work stream on cash — would also increase the reach of the template.