



THE 8+3 TEMPLATE

KEY INFORMATION
ON THE NEW
HARMONIZED
REPORTING
STANDARD



Reading
Time:
8 min

Background

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. In response to the growing reporting burden felt throughout the humanitarian system, one of the Grand Bargain’s priorities is to harmonize and simplify donor reporting requirements so that reporting becomes simpler, more efficient, and less burdensome. In line with this goal, Grand Bargain signatories agreed to simplify and harmonize reporting requirements by the end of 2018 – by reducing its volume, jointly deciding on common terminology, identifying core requirements, and developing a common report structure.

Addressing a Growing Reporting Burden Through a Simplified Reporting Template

Reporting requirements are high and partners have to produce a substantial number of weekly, monthly, quarterly, mid-term, and final reports to fulfill the particular reporting requirements of different donors – all of which require time and resources. As the International Council of Voluntary Agencies (ICVA) has highlighted in their study “Less Paper, More Aid,” this puts a serious strain on partners and is often counterproductive for more efficient and effective humanitarian action. In line with the Grand Bargain commitment to simplify and harmonize reporting requirements, the German Federal Foreign Office (GFFO), the Global Public Policy Institute (GPPi) and ICVA developed a simplified reporting template – called the “8+3 template” – in 2017. Based on common reporting practices, it contains of up to 8 “core” questions and up to 3 “additional” questions, hence its name, and seeks to reduce the often large investments of time and resources needed to complete reports. Beginning in June 2017, a pilot project has tested the template extensively in Iraq, Myanmar and Somalia. This pilot continues until June 2019.

The Benefits of the 8+3 Template

The 8+3 template is designed to make reporting less time-consuming, more predictable and more precise. An initial review of the template showed that:



It simplifies narrative reporting through easy language and precise question guidance.

Non-native English speakers who support or write reports in particular benefit from such simplification.



It harmonizes narrative reporting by standardizing core questions. All donors who use the template will ask up to 8 of the same core questions. The more donors use the proposed questions, the greater the effect of harmonization in making reporting more predictable. Those using such a harmonized template know immediately what is expected from them and there is less need for time- and cost-intensive trainings on how to write reports for different donors.



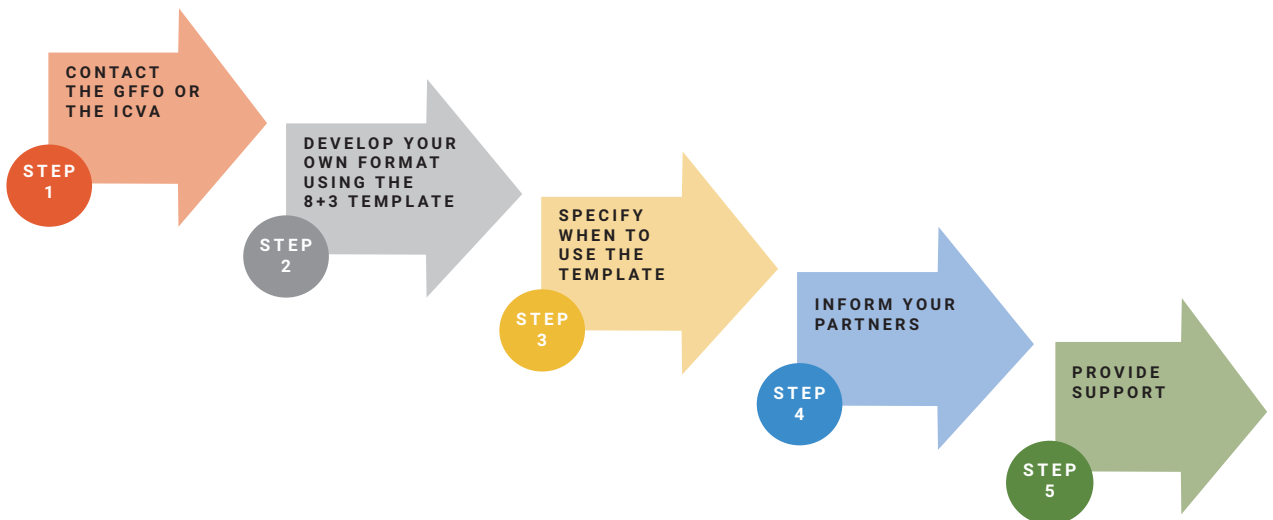
It is flexible because it allows donors to select the number and combination of questions and the level of detail depending on their information needs.

The 8 core and 3 additional questions together represent the maximum number that donors should ask. Donors are encouraged to ask only for the information they need, which is often less than the full 8+3 questions.

How to Get Started

Every organization funding humanitarian activities is strongly encouraged to introduce the 8+3 template for narrative reporting. Partners reporting on humanitarian activities are encouraged to suggest the 8+3 template to their funders. At this point, it is possible to either join the ongoing pilot in Iraq, Myanmar and/or Somalia – and contribute to further data collection – or to introduce the 8+3 template independently of the pilot as a new reporting standard. While the original 8+3 template has slightly changed following initial feedback, only minor changes to the template – if any – are expected to happen after the end of the pilot. Eventually, the 8+3 template is intended to become the new global reporting standard for narrative project and program reports.

To get started, we suggest you first approach either the German Federal Foreign Office (GFFO) or the International Council of Voluntary Agencies (ICVA) to get the latest template materials using the contact details below. Based on this template, donors can then choose from the 8 core questions which reflect their information needs and up to 3 questions from the suggested additional questions. Each donor should also develop internal guidance how often reporting is required (e.g., quarterly reports, final reports) and for what type of funded activities the harmonized template will be used (e.g., projects and/or programs, etc.). You should then inform your partners that you will introduce a new reporting standard from now on. If necessary, IT-systems may need to be updated to reflect the new reporting standard and you should prepare yourself to provide support services internally and to your partners:



HOW TO GET STARTED WITH THE 8+3 TEMPLATE

FAQS

What is the “8+3 template”? The 8+3 template is a new approach to narrative reporting. It is essentially a menu of standardized questions from which every donor can select depending on their information needs. The 8 “core” and 3 “additional” questions are the maximum a donor should ask in narrative reports. Less is always possible and even a report with only a single question would be in the spirit of the 8+3 template.

What can the template be used for? The 8+3 template is primarily designed for project reporting. However, because it is flexible and can be adjusted depending on circumstances, donors – in coordination with partners – can also use it for program-level reporting.

Can I use it for intermediate (weekly/monthly/quarterly) reporting as well? Yes. The 8+3 template can be used in these cases. Because it is flexible, users should adapt the template depending on circumstances and generally ask fewer questions the higher the frequency of reporting. Information on risks, sustainability and exit strategy, for instance, is often not relevant for monthly reports. Participating donors are generally advised to avoid requiring full reports from partners on a monthly or weekly frequency.

Does using the 8+3 template affect the frequency of reporting? No, you are free to set your own frequency for narrative reports. Nevertheless, you are encouraged not to ask for weekly or monthly reports as these are very burdensome for partners. If you require narrative reports more frequently, only using a few questions from the template would be advisable.

What is the “Harmonizing Reporting pilot”? The Harmonizing Reporting pilot is a two-year trial of the 8+3 template that started in 2017 and ends in June 2019. A number of donors and partners are currently testing the template, primarily in Iraq, Myanmar and Somalia. Findings from the pilot are used to refine the template questions and to develop additional guidance.

Which donors are actively participating in the pilot? By the end of 2018, Canada, Germany, France, Italy, Norway, Switzerland, Sweden, and the UK, as well as UNOCHA, UNHCR, UNICEF, and WFP are using a version of the 8+3 template as part of the pilot.

Can my organization join the pilot at this stage? Yes. Since it is already well advanced, formally joining the pilot requires swift action: developing your own version of the 8+3 template and informing partners in the pilot countries that they have to use the new reporting format for their next reports. Please contact the GFFO or ICVA if you are interested in joining the pilot.

What are the initial results of the pilot? Experiences with the 8+3 template are positive so far. A mid-term review of the pilot which was concluded in June 2018 showed that those tasked with writing reports generally value the simplification the new template brings as well as the clarity of the questions and question guidance. Local staff particularly benefit from this simplification and the 8+3 template increasingly proves valuable for achieving a greater localization of aid, another Grand Bargain commitment. Significantly, the quality of reporting – an important concern for donors – often improves as a result of using the 8+3 template: at times, those receiving reports find them to be more precise. Please read the [full mid-term review of the pilot](#) for more details on the initial results of and views on the pilot.

When is the best time to introduce the 8+3 template in my organization? Now. Even though the 8+3 template is being piloted until June 2019 in three countries and potentially subject to minor revisions, donors are encouraged to introduce the 8+3 template as their new reporting standard for all their funded activities. The results of the pilot (see previous question) strongly encourage the use of the 8+3 template as a new global reporting standard for humanitarian projects or programs.

How should I address internal resistance? Since the 8+3 template is a break with existing practices, you may experience some form of resistance in your organization when introducing the 8+3 template. However, the 8+3 template is essentially a summary of existing good reporting practices packaged in consolidated and simplified language. The same information as before will generally be available in your narrative reports, but the template will greatly help your partners. Moreover, the modular design of the 8+3 template allows for the selection of those questions most relevant to you.

What else could I do beyond using the 8+3 template to reduce the reporting burden? Achieving the Grand Bargain commitment to harmonize and simplify narrative reporting and to substantially reduce the reporting burden faced by partners requires greater effort than just introducing the 8+3 template. While it is a critical first step, donors should also review the risks they are willing to accept, and how to move from a logic of control to a logic of trust. The mid-term review of the pilot by GPPi as well as the “Less Paper, More Aid” report by ICVA both provide further ideas and suggestions on this.

Who is responsible for all this? The 8+3 template is the central element of the Grand Bargain work stream 9, which is co-convened by the GFFO and ICVA. As co-convenors, Germany and ICVA have collaborated with the Global Public Policy Institute (GPPi) since 2017 to develop and trial the 8+3 template.

What if I need to ask more questions? The GFFO and ICVA are happy to answer any questions you may have. Please contact:

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