



THE 8+3 TEMPLATE

ESSENTIAL GUIDANCE
ON USING THE
NEW HARMONIZED
REPORTING TEMPLATE

Background

As part of the Grand Bargain, donors committed to making humanitarian assistance less bureaucratic by harmonizing and simplifying their reporting requirements. To this end, a short, unified reporting template was developed, called the the harmonized reporting template or the ‘8+3 Template’ due to the maximum number of questions that should be asked.

This guidance is intended to assist primarily donors but also partners in using the 8+3 template. It contains good practice examples, as well as guidance on how to adapt the template for progress reports, final reports, and reporting on programs. It’s aim is to support efficient reporting without compromising the information needs donors have.

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01| Limit the Frequency of Reporting

To cut down the reporting workload, donors are encouraged to ask for reports less often.

Donors should also refrain from requesting more information outside of the formal reports as much as possible. If donors need informal progress updates, they should agree on what should be included in these updates and when they should be made with their partners ahead of time, while taking their partners’ capacities into account.

Verbal or personal informal progress updates are usually less demanding on partners than written communication, which often tends to require administrative steps and formal clearances.

02 | Accept Reports in English

Donors are encouraged to request and accept reports in English since this is the most commonly used language in the humanitarian community.

In contexts where another language is the main working language of the humanitarian community, donors can translate the 8+3 template into that language. In doing so, they should stay as close as possible to the original meaning of the questions and the instructions for partners.

In these cases, donors should coordinate to make sure they all use the same translation. Ideally, the German Federal Foreign Office is also informed so that they are able to let partners know that translations exist.

03 | Create a Customized Template

The unified reporting template consists of eight core and up to three additional questions. Donors can fit the template to their information needs by choosing all or only some of the eight core questions AND choosing up to three additional questions out of six different possible options.

When creating their customized template:

- Donors should ask as few questions as possible. Even a reporting template with only one question would be in line with the idea of the harmonized reporting template.
- Donors should always include the “Instructions for partners” in their templates as they give detailed information on how to answer each question.
- Donors should not change the wording of the questions or instructions for partners.
- Donors are free to change the word limit if they need to. The word limit for each question is only a suggestion.

04 | Adapt the Template for Progress Reports

When adapting the 8+3 template for progress (or “intermediate”) reports, donors should (a) select questions that match the specific purpose of that particular progress report, (b) ask for essential information only, and (c) reduce the level of detail requested.

Progress reporting should not be intended to maximize the information requested but to consciously choose questions based on the following points:

- Determine what information your organization really needs at this stage of the project or program and what information can be provided later.
- Discuss and agree with your partners what data can be collected, when and how often. Take security challenges and staff capacity issues into account.
- Determine how detailed progress reports need to be and reduce the word limit for each question accordingly.
- Determine which questions are essential for the type of report you request.

The table below offers an overview how the 8+3 template can be adapted to different types of progress reports. The primary purpose of the progress report – that is whether it is used more for accountability and control or if it also seeks to support learning – determines which questions are most appropriate:

Suggestions for Adapting the 8+3 template for Different Types of Report

| | Shorter Reports | | | Longer Reports |
|----------------------------|---|--|---|---|
| FREQUENCY | Weekly Reports | Monthly Reports | Quarterly Reports | Mid-Term Reports |
| PURPOSE | Accountability / Control | Accountability / Control | Accountability / Control and Learning | Accountability / Control and Learning |
| SUGGESTED QUESTIONS | Q3: Measuring Results Q4: Affected Persons | Q1: Overall Performance Q3: Measuring Results Q4: Affected Persons | Q1: Overall Performance Q2: Changes and Amendments Q3: Measuring Results Q4: Affected Persons Q6: Risk Management Q8: Lessons Learned | Q1: Overall Performance Q2: Changes and Amendments Q3: Measuring Results Q4: Affected Persons Q5: Participation & AAP Q6: Risk Management Q8: Lessons Learned |
| NOTES | Weekly reports are strongly discouraged unless absolutely necessary. If a weekly report is requested, we suggest asking only one or two questions. | Monthly reports should be the exception unless regular updates are necessary. If a monthly report is requested, we suggest limiting reporting to three questions that provide a general overview to fulfill accountability. | Quarterly reports are a good frequency for intermediate reports as they allow for a general overview and also provide critical information used for learning. To achieve this, we suggest including questions on lessons learned and risks & risk management. | Additional questions from the template may be added depending on donor preferences. Mid-term reports are more detailed than quarterly reports and should be used as tools for accountability and learning. Asking all 8+3 questions is possible but not encouraged unless the information provided is critical at the mid-point of the project or program. |

05 | Adapt the Template for Final Reports

Similar to progress reports, donors should carefully assess which information they require for what purpose when asking their partners for final reports. For the most part, final reports document activities for accountability purposes and highlight outcomes, beneficiaries reached, justify deviations from the original funding request and provide lessons learned to inform future funding and operational priorities.

The eight core questions of the 8+3 template capture all of these aspects well and are a generally recommended for final reports – in particular when progress reporting has been light or was not necessary. If a final report is the main source of information about a funded activity, donors are free to “maximize” the information partners have to provide by asking the maximum number of questions (8+3) and by extending the word limit on each question.

If donors have received detailed progress reports already, a lighter approach on the final report with fewer than all eight core questions may be more appropriate.

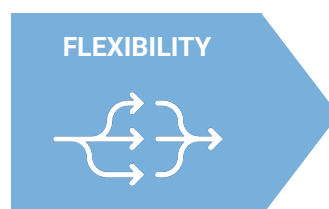
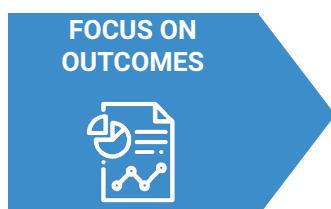
06 | Adapt the Template for Program Reports

The flexible design of the 8+3 template means it can be used for reporting on projects, the most common way of managing humanitarian assistance, as well as reporting on programs. Whereas project funding is usually very specific and earmarked, program funding is either unearmarked (as core funding) or loosely earmarked (for instance by specifying outcomes in a geographical location).

Program reporting based on the 8+3 template is recommended if the current reporting format or approach requires revisions or if the partner receives funding from different donors for the program and is asked to provide tailored reports for each funder. In that case, all donors funding the program should use the same reporting format and accept a single program report – ideally based on the 8+3 template. However, donors should not introduce the 8+3 standard in addition to an existing reporting format. This is particularly relevant for UN organizations or consortia who are receiving funding from multiple donors and who are often already preparing a single report to all funders instead of individual reports for each donor. If introduced, the 8+3 standard must replace the previously used reporting format.




When adapting the 8+3 template to program reports, donors should try to make sure that reporting matches the particular aspects of programs, which are:

The Core Traits of Program Funding



To mirror the three core traits of program funding, program reporting ideally focuses on outcomes and details as to why specific activities were taken, how risks were assessed, how coordination happened and what the key lessons learned are to inform future planning and program design.

The following 8+3 questions particularly match these reporting priorities:

| | | |
|---|--|---|
|  | <p>OUTCOMES</p> <p>Q1: Overall Measures Q3: Measuring Results Q4: Affected Persons Q5: Participation & AAP</p> | <p>Value for Money & Cost Effectiveness (from the “up to 3” additional questions)</p> |
|  | <p>FLEXIBILITY</p> <p>Q2: Changes and Amendments Q6: Risk Management</p> | <p>Choice of assistance modality or mix and reasoning (from the “up to 3” additional questions)</p> |
|  | <p>STRATEGIC OUTLOOK</p> <p>Q7: Exit Strategies Q8: Lessons Learned</p> | <p>Co-ordination (from the “up to 3” additional questions)</p> |

A comprehensive narrative program report – usually provided at the middle or end of the funding period – would be based on the questions mentioned above. As with other reports based on the 8+3 template, donors are free to determine the length of the answer for each question.

Importantly, this suggestion applies to detailed mid-term or final reports. If a program requires reporting more often (e.g. quarterly reports or reports at an even higher frequency), reducing the number of questions suggested above and the level of detail requested is strongly recommended.

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