



International Organization for Migration (IOM)  
The UN Migration Agency

IOM Mission- Armenia

IOM Call for Expression of Interest ID#: CEI 01/2021

Annex E Financial and Narrative Reporting Templates

## 8+3 [Interim/Final] Report to IOM

**[OFFICIAL PROJECT TITLE - write the project title as it appears in the agreement, the project proposal and the financial report]**

### Section 1: Basic Information

Name of Partner:

Project Identification: (IOM Project Code)

Project Name (or number, where applicable):

Project Geographical coverage (country/region):

Project Area (if applicable):

Reporting Period:

Project Start Date:

Project Planned End Date:

Date of submission:

Total Confirmed Project Budget:

Modality of assistance: *Please estimate the value of cash, vouchers and/or in-kind assistance and, if possible, also of the related programme costs. You may provide the same kind of data for programmes with a service delivery component if its value and related programme costs can be measured.*

[value] of cash transferred to recipients plus related programme costs

[value] of voucher-based assistance provided to recipients plus related programme costs

[value] of in-kind assistance given to recipients plus related programme costs

[value] of services delivered to recipients plus related programme costs (if measurable)

Explanation of modality choice: *Please provide a brief explanation why this modality or mix of modalities was chosen to deliver the best outcomes for the affected persons.*

### Section 2: The 8 Core Questions

**1. Overall Performance:** Write about the project/program so far. Include information about how successful it is and what results are achieved. Write about the objectives of the project/program, and



whether or not it is meeting these. Include information about its effect on the different needs of women, men, boys, girls, and vulnerable people. Suggested length: up to 1 page

*Instructions for partners (please delete these below before you submit your report):*

- *Write about the project/program as a whole but only as an overview. Include information about how progress has been made. Make sure you write about the context of the project, why it was needed, and its original aims.*
- *It is important to include information about how you found out about the needs of vulnerable people, and how you made sure the project took their needs into account.*
- *Include here a section on cross-cutting themes (e.g. gender, human rights, protection) and explain progress made towards incorporating such themes.<sup>1</sup>*
- *Explain how gender considerations were taken into consideration in this project, and how they were mainstreamed in project implementation. For example, were men and women involved in the project design and implementation in a comparable way? Unless the project was specifically targeted at one group, how did you ensure that men and women benefit from the project in a comparable way? How did you ensure that the needs and capabilities of persons with disabilities were addressed?*
- *Please briefly describe your approach to protection. How did you identify risks for affected populations? Which actions did you take to avoid or minimize risks for people?*
- *This question is different from question 3, “Measuring Results”. Here, make sure you give an overview about the project/program in general and in relation to its objectives. Your answer to question 3 on “Measuring Results” is where you should write about results in more detail.*
- *If you are writing an interim report, only write a little about the project/program as a whole. You can write about how you think the project/program will perform in the future. If you have submitted an interim report and this is your final report, include information about progress that has been made since the last report. You can mention important achievements, problems you have had, or any other information which has affected the project or its results.*

**2. Changes and Amendments:** Briefly explain any changes to the project/program from the original plan (whether in the implementation plan, activities, measures, or outcomes), and explain why you needed to make them, for example because of a change in needs or in the overall situation. Suggested length: 1/2 page to 1 page

*Instructions for partners (please delete these below before you submit your report):*

- *Explain any changes or amendments to the original proposal or project/program plan, and the reasons why you made them. This might include a discussion of how the humanitarian context has changed, changes in the needs of the beneficiaries, or other challenges or problems you had that meant the implementation plan, activities, indicators, or outcomes had to be changed. If a change was requested and approved by the donor, please mention it.*

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<sup>1</sup> According to the IOM Gender Equality Policy 2015–2019 (C/106/INF/8/Rev.1): “42a. Project reports will include a dedicated section on gender detailing gender-related accomplishments.” In addition, some donors have priorities on some of these cross-cutting themes and want to see analyses included in this section. This subsection therefore is a mandatory part of the donor report and is dedicated to a discussion on how cross-cutting themes relevant to the project (e.g. gender) have been addressed during project implementation.



- *For interim reporting, give recommendations for improving the design of the project/program or adapting the program to address these changes, including any changes to program goals, implementation plan, specific activities, indicators, or proposed outcomes. For final reporting, write about the changes that were made because of the change in circumstances, and how these affected how well you achieved the objectives or milestones set out 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 milestones or indicators that were established.

Where a logframe is required, the following logframe (sometimes described as an indicator tracking table) is recommended. Alternatively, you can use the logframe or indicator tracking table given in the original proposal. While the 8+3 template allows flexibility on which log frame is used, all narrative reporting should include a log frame as much as possible.

Level of results	Indicator(s)	Baseline (with data)	Targets & Milestones	Progress & Achievement to Date	Explanation of Variance	Source & Method of Verification
Outcome(s)						
Output(s)						

*Instructions for partners (please delete these below before you submit your report):*

- *Write about the outputs, outcomes, or results achieved. How much progress has been made towards the targets you identified for each indicator in the original proposal? Specifically write about whether the targets were met in time and explain why key targets or milestones were not met, and any differences between the expected results and the actual results. Explain the sources of measurement and verification used. For final reports, attach any monitoring and evaluation assessments taken.*
- *You should assess the results for each objective or outcome set out in the original performance plan, in both narrative and logframe form, unless the donor has asked for a logframe or a narrative description only. 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.*
- *You find an example logframe or indicator tracking table above. Where a project/program has identified specific components in terms of sector, geography, or time period, the logframe may be broken down by these components, as indicated in the project proposal.*
- *Please structure inputs under this question according to the results matrix structure used. Use the outcome and output results statements as subheadings.*

**4. Affected Persons:** Provide the number of people taking part in or affected by the projector relevant part of the program, split up by gender, age, and other guidance specified in the proposal. Best practice



is to provide this information in quantitative (numerical) form, in a table. A suggested table is provided below, but the table provided in the proposal or as agreed upon may be used instead.

LOCATION / ACTIVITY / OBJECTIVE (WHERE RELEVANT)*						
UNIT OF MEASUREMENT (CHOOSE ONE): INDIVIDUAL / HOUSEHOLD (HH) / ORGANIZATION / COMMUNITY						
Age Group	Male		Female		Total	
	Number	%	Number	%	Number	%
< 5		-- %		-- %		-- %
5-17		-- %		-- %		-- %
18-49		-- %		-- %		-- %
50 and >		-- %		-- %		-- %
<b>Total</b>		-- %		-- %		<b>100%</b>
<b>Planned</b>		-- %		-- %		<b>100%</b>
<b>Variance</b>	-- %		-- %		-- %	

\* 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.

*Instructions for partners (please delete these below before you submit your report):*

- Give the number of people reached by the project to date, disaggregated by gender & age (infants less than 5, children between 5 and 17, adults between 18 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, give quantitative (numerical) information. Include both the targeted and actual number of people reached.
- If your project/program agreement requires information on affected persons with disabilities, provide an overview by stating if and how many people reached had disabilities (absolute numbers and share). If you are writing an interim report, include both the number of people reached in the reporting period you are writing about and the total number reached so far. For example, in February (the reporting period) you reached 100 people, but January before you also reached 100 people, so the total is 200. Where a program or project has clearly identified specific 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 "beneficiaries." Because of the ongoing discussions about greater accountability toward and inclusion of the affected population, here we use the term "affected persons" instead of "beneficiaries."

**5. Participation of and Accountability to Affected Population:** Describe how the project/program has been designed to maximize accountability toward the affected population.

Suggested length: 1/2 page



*Instructions for partners (please delete these below before you submit your report):*

- *How have you given affected populations information about the organization and the project/program? How have you made sure that this information is well-timed and accessible to everybody? How were people affected by the crisis (including vulnerable and marginalized groups) involved and consulted in the design and implementation of the project/program? Which feedback/complaints mechanisms were in place for affected populations to report cases of mismanagement, misconduct and/or sexual exploitation or abuse?*
- *What did affected persons think about the assistance provided? If possible, quantify beneficiary feedback (for instance “40% of consulted persons find the received support useful”; or 18% of those consulted had complains”).*
- *How did you use their opinions as a guide when you made decisions? How was feedback collected, tracked, analyzed and taken into account? Did you have to make changes because of feedback you received? If so, how did you make the changes? Please give some evidence of collecting and using this feedback (e.g. tools for provision of information or tracking systems).*

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

*Instructions for partners (please delete these below before you submit your report):*

- *Update the risk management analysis<sup>2</sup> included in the initial proposal, if applicable. Were the right risks identified? What new risks were there that you did not expect? What did you do to mitigate or address the risks you identified? Did this work?*
- *Write about external risks from the overall environment, and internal risks, for example, related to financial or personnel management issues. This might include risks of sexual exploitation and abuse of beneficiaries by project staff, corruption, conflicts of interest, loss of or harm to project staff, and loss of or harm to project/program materials or resources, for example. If your project/program takes place in an insecure environment, make sure you write about security risks, including how the security situation evolved over the course of the project/program and how this affected project activities.*

**7. Exit Strategy and Sustainability:** Briefly describe the exit strategy and steps to end the project or program. Assess the sustainability of its results.

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<sup>2</sup> Use the Risk Management Plan (see Tool 4.3 in Module 4) that is being kept updated as part of project monitoring as input to this section. For any constraints or delays from internal factors, consider carefully if and how they should be conveyed outside of the Organization. For external factors, be sure to pay attention to tone and word selection. Strive to objectively evaluate and describe the key information about a given challenge; remain factual and do not assign individual blame for difficulties faced. Ask DRD, the relevant CORMF, or the Regional Liaison and Policy Officer for guidance on how to liaise with donors about constraints. In principle, if the Project Manager keeps the donor informed of constraints throughout the project, this section should not contain any real “surprise” for the donor.



*Instructions for partners (please delete these below before you submit your report):*

- *Write about the exit strategy for closing the project/program and the expected after-effects of the project. Focus on the sustainability of the project/program, or whether and how results or benefits will continue after it ends.*
- *You can write about how the project/program contributed to the resilience of communities, or how it has supported local partners' capacity. This is particularly important if resilience and support for local partners' capacity were part of the project proposal.*
- *For some projects/program, it may also be appropriate to write about ways that parts of it will continue, or will feed into other long-term recovery, rehabilitation or development efforts. For example, did the project/program support long-term strategies to reduce humanitarian needs, vulnerability and risks?*
- *Depending on financial regulations, some donors may require a catalogue or inventory of any equipment, capital goods, or other assets that were purchased with project/program money, and information about how they will be transferred, disposed of, or otherwise dealt with when the project/program ends. Provide this information here.*

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

*Instructions for partners (please delete these below before you submit your report):*

- *If you are writing an interim report, describe primarily the strongest and weakest parts of the project/ program, or what parts or strategies made the project/program successful or a failure, and explain what you learned from these.*
- *For interim reports, outline next steps in the project's implementation, briefly reiterating any significant and/or persistent challenges anticipated for upcoming period. Please also reflect on the lessons learned in relation to the project/program management, your engagement with local partners, your protection activities, your coordination with affected persons, or to others engaged in the situation.*
- *For final reports, implementing partners should additionally focus on how lessons learned will be applied in future projects or programs. What are suggestions for improving the design of similar interventions in the future? Based on the experiences or challenges that came up, what will the organization do the same or differently in future similar projects/programs?*
- *As a general advice for this question: frame your answers in terms of what you learned instead of describing what went well or did not go well.*

## **9. Expenditures and Resource Utilization**

*Instructions for partners (please delete these below before you submit your report):*

- *The financial report is to be attached to the narrative report as a separate document. This section can be used to describe any issue faced in budget execution or technical issues related to the accounting and reconciliation of expenditures, such as variances in actual expenditures on a given budget line compared with the funds allocated for that purpose.*



- *Include also highlights on the costs related to risk treatment plans which have been implemented during the reporting period to either address risks which were realized or to mitigate risks which were deemed to have had a high probability of occurring during the reporting period.*
- *If relevant, explain exchange rate fluctuations which may have affected the amount of funding available to a project, as well as any significant rise or fall in the burn rate of project funds and the alignment of cost category as a result of unforeseen changes in the operating environment, such as renewed volatility in an insecure, post-conflict environment or a sudden onset natural disaster in a climate-affected region. Volatility could force disruption of operation and low spending on operational activities while staff costs are fixed and running. This could cause a disproportionate staff and office, and operational costs or a delay in recruiting project staff which, if such is the case, should be explained here. Add a note on in-kind contributions which have been received from traditional government donors, United Nations agencies, non-governmental organizations and private sector partners during the reporting period. Where possible, express the monetary value of these in-kind contributions. Any additional, relevant financial information that is not conveyed through the financial report can be described here.*

### **Section 3: Additional Questions (select up to “3”)**

**1. Value for Money/Cost Effectiveness:** Assess the value for money or cost effectiveness of the project or program.

*Instructions for partners (please delete these below before you submit your report):*

- *Write about whether the project/program is good value for money. Assess its cost-effectiveness compared to what was projected in the proposal. Write about ways in which you saved money in the implementation of the project/program. Explain any cost overruns or high costs per unit or objective.*
- *For interim reporting, write about how you will make sure that the project represents good value for money going forward. If an audit has been conducted, include details of the last report.*

**2. Visibility:** Describe how the support for this project/program was made public. If any visibility or acknowledgement plans which were outlined in the proposal were not conducted, explain why, and what you will do instead.

*Instructions for partners (please delete these below before you submit your report):*

- *If you have attached photos or illustrations of visibility, you do not need to write much.*
- *If you are writing about visibility plans that were adapted or things you did not do, explain if the donor gave prior approval and the date of your request for approval.*

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



*Instructions for partners (please delete these below before you submit your report):*

- *Describe how you coordinated with the host government, other relevant organizations and the broader humanitarian system, including the cluster system and alignment to HRP/other relevant UN-led appeals/coordinated responses (where applicable).*
- *Write about how this has contributed to the project/program, for example, any good examples of working together with other projects/programs, or any other benefits that were the result of coordination. Are there ways that coordination could have been better or could have improved project outcomes?*

**4. Implementing Partners:** List any implementing partners for this project or program and assess their role and contribution, if applicable.<sup>3</sup>

*Instructions for partners (please delete these below before you submit your report):*

- *Who were the implementing partners or subcontractors for this project/program, if applicable? Write about the role they played in implementation and how good their participation or contribution was.*
- *If you worked with local partners, stakeholders, write about any specific examples of how working with local partners added value.*
- *Write about your efforts to improve implementing partners' capacity or their ability to work on similar projects/programs in the future. Were there ways that the project/program could have been better structured to improve engagement with or implementation through partners?*

**5. Activities or Steps Toward Implementation:** Write about the implementation steps taken so far, the activities that have been conducted, and the management arrangements to ensure project/program implementation.

*Instructions for partners (please delete these below before you submit your report):*

- *Describe how the project/program activities have been implemented so far. Please include a description of the management and implementation arrangements for them, and how these were coordinated with other partners or relevant stakeholders.*
- *Write about any changes in the activities or implementation plan so far and any planned changes going forward.*
- *Specific for interim reports, focus primarily on a comparison between the agreed-upon implementation plan (if one exists) and the actual implementation steps taken so far. Point out deviations from the original plan and explain why these changes happened or were necessary.*

**6. Environment:** Write about how environmental issues were addressed and the impact of the project or program on the environment.

*Instructions for partners (please delete these below before you submit your report):*

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<sup>3</sup> IOM agreements with implementing partners typically do not allow sub-granting.





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- *Describe how environmental or climate issues were addressed. What did you do to ensure that the environment was protected and to manage risks to the environment? What environmental guidelines or policies did you follow?*
- *If the project produced positive outcomes for the environment, for climate sustainability, or better future resilience against natural disasters, write about them here.*

## **Annexes**

*Instructions for partners (please delete these below before you submit your report):*

*List the other annexes that are attached to the narrative report, if any. If there are no annexes to attach, please note this here. Ensure that the annexes are mentioned in the body of the text, and that the numbering of the annexes matches their order of appearance. Note that the financial report is not considered or counted as an annex. Note too that the updated Risk Management Plan is an annex to the donor report that is only circulated internally and is not to be submitted to the donor unless the donor agreement stipulates it.*