

## A USER-FRIENDLY PROJECTS HANDBOOK FOR TRADE UNIONISTS



## ANNEX 5 MID-TERM REPORTING GUIDELINES

# MID-TERM REPORTING GUIDELINES

## Section 1: Key Information

This first section presents basic information pertinent to the project for easy reference, particularly for the perusal of TUSOs. It covers the following:

- ▣ project title
- ▣ project number
- ▣ name of the implementing organization/s
- ▣ country
- ▣ project coordinator
- ▣ project period
- ▣ reporting period
- ▣ approved budget and project expenditure

## Section 2: Introduction

This section provides a brief backgrounder on the project report. Simply narrate in four or five sentences the general results and outcome of the project activities during the last 6 months. Include major developments, issues and events surrounding the project implementation if there are any.

## Section 3: Project Activities

This is the most important section of the midterm report. It indicates whether the targeted activities have been carried out or not. The “target versus actual” framework is suggested. It will be best to illustrate the same in a matrix specifically for activities such as seminars, workshops, trainings and conferences. Important information in the matrix should include:

- ▣ The title of the seminars, workshops, trainings, conferences, etc.
- ▣ Targeted number of seminars (workshops, etc.), participants (male, female and total)
- ▣ Dates of implementation

Include brief remarks on the following:

- ▣ unimplemented and unplanned activities -- reasons for the non-implementation and deviations
- ▣ delays in implementation

Other activities which are difficult to illustrate in a matrix such as researches, publications, etc. can be presented separately in narrative form. The same “target versus actual” framework should be used in describing whether said activities have been carried out.

## Section 4: Explanatory Notes on the Financial Report

An important principle to consider is that the financial report is coherent with the content of the project plan. This section provides a narrative presentation of the project financial report. It shall also cover explanatory notes, whenever necessary, on some issues in the report such as substantial deviations from originally approved budget.

## Section 5: Project Implementation and Administration

This section briefly describes how the project was generally implemented and administered. It also shows who were the key people involved in the implementation of the activities, finance administration and over-all management of the project. It is also important to note what problems were encountered in the performance of said tasks.

## Section 6: Future Plans

This last section covers the plans (and adjustments if there are any) for the next semester of the project year.