

**A USER-FRIENDLY  
PROJECTS HANDBOOK  
FOR TRADE UNIONISTS**



**ANNEX 6**  
**ANNUAL REPORTING GUIDELINES**

# ANNUAL REPORTING GUIDELINES

## Section 1: Key Information

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

- ▣ project title
- ▣ project number
- ▣ name of the organization
- ▣ 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. It shows the context -- major internal or external developments, issues and events -- surrounding project implementation and the entire project cycle during the period in review. One way to do this is to cite political developments or internal organizational changes which affected the project, favorably as well as adversely. A short description of major project effects and impact at the end of this section is highly commendable.

## Section 3: Project Objectives, Expected Results and Indicators

In this section, the targeted annual project objectives, expected results and indicators are reviewed and evaluated based on the project outputs, effects and impact achieved. The following guideline and guide questions will be very useful:

- ▣ To what extent were the project objectives achieved? The achievement of the project objectives can be measured through the expected results and list of indicators. It is suggested that the "target versus actual" framework (did we do what we said we planned to do?) is used in evaluating the expected results and indicators. What were the targets set and what have been achieved during the reporting period?
- ▣ The project effects whenever possible should be quantified (based on numbers) and/or qualified (based on analysis).
- ▣ What were the contributing factors in the achievement of the objectives and expected results?
- ▣ What were the problems encountered?
- ▣ What are the effects on gender relations?
- ▣ Listing down the sources of verification that can substantiate the project objectives, expected results and indicators that have been achieved will help justify the report.

## Section 4: Project Activities

This section indicates whether the targeted activities have been completed or not. Again, 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 and conferences
- ▣ 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.

One important question to answer is if “we would continue doing the project activities in the same way?”

### **Section 5: 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. Matters concerning local counterpart contributions and sustainability should be mentioned here.

### **Section 6: 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, and if any solutions were identified or applied for correction? Changes or corrections in project implementation, administration and personnel should be explained.

### **Section 7: Conclusion and Future Plans**

This last section covers the summary of the major lessons learned from the project during the period in review. It extends project reporting beyond the question of “*What has been done?*” to equally important concerns such as “*How were things done?*”, “*Did we do the right things?*”, “*Did we analyze the problems (in the problem analysis) correctly?*”, “*Where did we grow?*”, “*How did we improve?*”, “*Where have we been most effective?*”, and “*Do we continue to do what we did before?*”

Lastly, future plans (for the next year) are also indicated in this section -- plans that are drawn from the experiences and lessons of the previous year.