

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



**ANNEX 7
FINAL REPORTING GUIDELINES**

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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 organization
- ▣ country
- ▣ project coordinator
- ▣ project period
- ▣ reporting period
- ▣ approved total project 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 during the entire lifespan of the project. One way to do this is to cite political developments or internal organizational changes which affected the project, favorably as well as adversely. A summary description of major project effects and impact at the end of this section is highly recommended.

Section 3: Project Objectives, Expected Results and Indicators

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

- ▣ Were the project objectives achieved? 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 whole project period?
- ▣ The project effects or impact whenever possible should be quantified and summarized (based on numbers) and/or qualified (based on analysis) covering the whole project’s lifetime.
- ▣ What were the main contributing factors in the achievement of the objectives and expected results?
- ▣ What are the effects on gender relations?
- ▣ What were the major problems encountered?
- ▣ 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.

At the end of this section, a general summary of the major project effects and impact can be illustrated by responding to this question: What difference did this project make to our trade union or organization? How has the project changed the target group? – awareness, skills, behavior, attitude, etc.

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: 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 covering the whole lifespan of the intervention. 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 major problems were encountered in the performance of said tasks, and if any solutions were applied.

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 whole period in review. More attention should be given to this section. 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?"

Other important questions include when considering the whole project lifetime are: "What are the significant changes at target group level?", "What considerations are there concerning the financial sustainability of the trade union/s or organization/s involved?", "What are the ideas on follow-up?", and, "Are there concrete plans?"

Lastly, future plans are also indicated in this section -- plans that are drawn from the experiences and lessons of the previous years.