

Harmonized Reporting Pilot: Key Information for Policymakers

What Are the Pilot's Main Findings?

Piloting the harmonized reporting template showed that most users view the new template as a significant improvement over existing donor templates since it simplifies and standardizes the reporting process considerably. As such, the new harmonized reporting template is an important building block in achieving the Grand Bargain commitment to “simplify and harmonize reporting requirements.”

All interviewed partners valued the simplification and predictability the 8+3 template introduces in the reporting process. With only one exception, all the partners interviewed also suggested that their donors who used the new harmonized reporting template should not go back to their old templates but continue to use the new template. Importantly, the one partner who was critical cited unfamiliarity with the template as the main reason for his opinion, not deficiencies of the template as such.

Among the donors, 9 out of the 11 who completed a survey assessed the template positively overall, and 6 out of 11 found that the quality of the reports they receive from their partners has improved. Some donors also see tangible benefits, such as quicker turnovers and fewer requests for additional information, since the the new template enables partners to provide information more accurately.

At this point, **UNHCR, OCHA, France, Germany, and the US State Department (PRM) will continue using the 8+3 template globally** (exceptions apply) and/or introduce it across their grant portfolios.

The full report can be accessed here: www.gppi.net/eightplusthree

What Actions Should Be Taken Now?

- Within the next 3–6 months, donors should **take an organization-wide decision** on whether they will use the 8+3 template. Ideally, given the positive feedback on the template, donors will either introduce or scale up their use of the harmonized reporting template.
- Partners, particularly international NGOs who subcontract extensively, should **commit to reducing their partners' reporting workload**. Ideally, the harmonized reporting template will serve as a basis for internal monitoring and reporting as well.
- On behalf of their members, NGO networks **should actively advocate for a broader uptake and more consistent use** of the harmonized reporting template among both donors and partners.
- The work stream co-convenors should **immediately address the few shortcomings of the harmonized reporting template** and engage with donors to develop options for ensuring continued guardianship over the template to make it future-proof.
- The work stream co-convenors should also **invest further time and resources in increasing donors' knowledge of the good reporting practices** that have already been developed.
- Pilot participants and co-convenors should **actively improve their communication** around the 8+3 template.
- Beyond the template, donors should **carefully evaluate and seek to reduce the frequency** with which they request reports.

* The recommendations presented here are drawn from a larger number of action points detailed in the full endpoint review report.