Annex VI-A  
  
Intermediate and final narrative reportS

**ANNEX VI-A - INTERMEDIATE NARRATIVE REPORT**

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| To be inserted if applicable  Model half-yearly reports |

This report must be completed and signed by the Beneficiary's contact person.

The information provided below must correspond with the financial information supplied in the financial report.

Please increase the size of the sections if required.

***Please refer to the special conditions of your grant contract and send a copy of the report to each address as stated.***

Expertise France will reject any incomplete or incorrectly completed report.

The response to each question must cover the reference period as specified below.

Period: from … to …

Project name:

Organization:

Total amount of the grant:

Total year x:

|  |
| --- |
| If applicable  Total week 1, year x:  Total week 2, year x: |

Amount of the current prefinancing tranche:

Prefinancing tranche consumption level:

***Contents***

***List of acronyms used in the report***

1. **Description**
   1. Name of the grant contract Beneficiary:
   2. Name and function of the contact person:
   3. Name of the project Beneficiary and Partners:
   4. Project name:
   5. Contract number:
   6. Start and end date of the reference period:
   7. Country or target region(s):
   8. End Beneficiaries and/or target groups[[1]](#footnote-1) (if different) (including the number of men and women):
   9. Countries in which the activities are carried out (if different from point 1.7):
2. **Evaluation of project activity implementation**
   1. **Summary of the project and its challenges**

*2.1.1 Description of the project*

*Describe the project by stating (i) the research assumptions, (ii) the objectives and anticipated results over the period, (iii) the main activities scheduled over the period, and (iv) the key costs and resources scheduled over the period. (1 page maximum).*

*By referring to the updated logical framework matrix[[2]](#footnote-2) (see point 2.3 below), please describe and comment on the extent to which the results have been obtained, if pertinent at this stage, and the probability of the final targets relating to the results being achieved on conclusion of the project.*

*Please state if the intervention rationale is still valid and justify any possible changes.*

*Please state any change that should be made to the logical framework matrix and briefly explain why [the full explanation must be provided in the following section under the relevant point (results, outputs, activities)].*

*2.1.2 Summary of challenges*

*Please state the main developments (activities and results) to project implementation by highlighting the main problems encountered, the solutions adopted and the lessons learned (1 page maximum).*

* 1. **Results and activities**

*How do you assess the results obtained to date? Include your observations on the execution and production of outputs, results and impacts and state if the project has had unexpected positive or negative results.*

*By referring to the updated logical framework matrix (see point 2.3 below), please comment on the level to which all the results have been achieved based on the current values of the corresponding indicators, in addition to all related activities performed during the reference period.*

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| To be inserted if applicable – initiative 5%:  *Describe the factors giving a better understanding of the project implementation context which are likely to have an influence on the project's implementation or results: changes to national strategy, programme changes (diagnostics, coverage, cost responsibility…), epidemiological data, status of research/understanding, changes to the financing approach of the Global Fund in the country, any complementarity/redundancy of the project versus other ongoing or planned projects in the country/region, significant security, political or social developments, change to project team members, current factors concerning the various partners/CCMs and, more generally, any incident likely to affect the project.* |

**Result (R) - «<Result name>»**

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| To be inserted if applicable – initiative 5%:  *Describe the activities and results obtained for each specific objective of the project.*  *Four points must be developed for each specific objective:*  *- Detailed description of the activities carried out, notably by specifying the methodology used and the dates/periods of the activities carried out, the data collected (type, quantity), including the resources and tools used, the sites in question and analysis performed.*  *- Description of the training activities (continuous training, organization of workshops): dates, places, contents, participants and impact*  *- Description of the scientific results, notably the main results of the analysis performed.*  *All additional documents (reports, specific papers, analytical results, maps, guides, tools, publications, training modules, etc.) must be appended to the report.*  *- Comparison between the activities performed and the activities as planned (if possible, estimate the percentage progress of the activities/research protocol), and explain any variances.*  *- Comparison between the results obtained and results as anticipated (here you must explain the various indicators of the logical framework).*  *- Has the research protocol as appended to the Contract and submitted to the Ethics Committee been adhered to?*  *- What ethical issues have been encountered during the activities performed during these six months and what action have you implemented in response?* |

*<comment on the current levels of the indicators corresponding to the result and explain all changes that have taken place, mainly any lowering of performance; please refer to the assumptions in the logical framework>*

**As applicable, Intermediate Result 1 (IR 1) - «<name of Intermediate Result 1>»**

**(…)**

**Output 1.1 (Output 1.1)**

**(…)**

*<after assessing the above results, please specify all activities/subjects covered and implemented>*

**A. ACTIVITIES**

**Activity 1.1.1**

*<please describe the problems – e.g. delayed, cancelled, deferred activities – that have emerged and how they were resolved> (as applicable)*

*<please list the risks which could have compromised the implementation of certain activities and explain how they were responded to> (as applicable)*

**Activity 1.1.2**

***<…>***

**B. PROJECT MANAGEMENT**

* 1. Budget utilization

*Compare the forecast budget for the 6-month period with expenditure actually incurred. Explain any variances.*

* 1. Organization and human resources

*Describe the material and human resources employed for project implementation*

* 1. Management, control and evaluation

*Describe the evaluation-monitoring activities implemented (e.g. steering committee, monitoring assignments in the field, scheduling meetings with partners, list of tools used, audits, etc.)*

**C. CONSTRAINTS, SOLUTIONS AND LESSONS**

*What are the strengths, weaknesses, progress/constraints encountered during project implementation in these three areas?*

*What constraints/problems have been encountered to date? What measures have been taken (or will be taken), and by whom, to resolve such issues?*

*Have the identified risks been encountered or avoided? What preventive or corrective measures have been implemented or planned? Have any new risks been identified?*

* 1. **Updated logical framework matrix**

Present an updated version of the logical framework matrix, highlighting any changes made.

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| --- | --- | --- | --- | --- |
| **LOGICAL FRAMEWORK OF THE PROJECT** | | | | |
|  | **Intervention**  **logic** | **Objectively verifiable**  **implementation indicators** | **Verification**  **sources and means** | **Assumptions** |
| **General**  **objectives** |  |  |  |  |
| **Specific**  **objective** |  |  |  |  |
| **Anticipated**  **results** |  |  |  |  |
| **Activities**  **to be developed** |  |  |  |  |
|  |  |

<please list all the contracts (works, supplies and services) awarded for the implementation of the project during the reference period, stating for each the amount and contractor name and providing a brief description of how they were selected.>

* 1. Please provide an updated action plan for future project activities[[3]](#footnote-3)

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| **Year** | | | | | | | | | | | | | | |
|  | H1 | | | | | | | H2 | | | | | |  |
| Activity | Month 1 | 2 | 3 | 4 | 5 | 6 | 7 | | 8 | 9 | 10 | 11 | 12 | Implementation  entity |
| *Example* | *Example* |  |  |  |  |  |  | |  |  |  |  |  | *Example* |
| Activity 1 preparation (name) |  |  |  |  |  |  |  | |  |  |  |  |  | Beneficiary or partner 1 |
| Implementation  Activity 1 (name) |  |  |  |  |  |  |  | |  |  |  |  |  | Beneficiary or  partner 1 |
| Activity 2 preparation (name) |  |  |  |  |  |  |  | |  |  |  |  |  | Beneficiary or  partner 2 |
| Etc. |  |  |  |  |  |  |  | |  |  |  |  |  |  |
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1. **Beneficiaries and other cooperation**
   1. How do you assess the relations between the beneficiaries and partners of this grant contract? Please provide specific information for each beneficiary/partner.
   2. How do you assess the relations between your organization and the public authorities in the project country? How have these relations affected the project?
   3. As applicable, describe your relations with any other organization taking part in project implementation:

* Associate(s) (if any)
* Co-contractor(s) (if any)
* End beneficiaries and target groups
* Other third parties involved (including other donors, other government agencies or local government entities, NGOs, etc.).
  1. As applicable, describe the links and synergies you have established with other projects.
  2. *If your organization has previously received other grants from Expertise France with the objective of supporting the same target group, to what extent has this project been able to enhance/supplement the others?*

1. **Visibility**

How is the visibility of Expertise France’s contribution being achieved during the project?

**Expertise France may wish to publish the results of projects. Would you have any objections to this report being published on the Expertise France website? If so, please explain your objections.**

Name of the project contact person:

……………………………………………

Signature: ………………………………

Place: ………………………………

Report due date: ……………………..

Report submission date: ………………………………..

**ANNEX VI-A - FINAL NARRATIVE REPORT**

*This report must be completed and signed by the Beneficiary's contact person.*

*The information provided below must correspond with the financial information supplied in the financial report.*

*Please increase the size of the sections if required.*

***Please refer to the special conditions of your grant contract and send a copy of the report to each address as stated.***

*Expertise France will reject any incomplete or incorrectly completed report.*

The response to each question must cover the reference period as specified below.

|  |  |
| --- | --- |
| Organisation |  |
| Project name: |  |
| Total amount of the grant |  |
| Period covered by the report | *from … to …* |
| Total expenditure year x |  |
| Total amount of prefinancing received |  |
| Estimated amount of balance payable or remainder to be reimbursed to Expertise France |  |

***Contents***

***List of acronyms used in the report***

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   2. Name and function of the contact person:
   3. Name of the project Beneficiary and Partners:
   4. Project name:
   5. Contract number:
   6. Start and end date of the reference period:
   7. Country or target region(s):
   8. End Beneficiaries and/or target groups[[4]](#footnote-4) (if different) (including the number of men and women):
   9. Countries in which the activities are carried out (if different from point 1.7):
2. **Evaluation of project activity implementation**
   1. **Summary of the project and its challenges**

*2.1.1 Description of the project*

*Describe the project by stating (i) the research assumptions, (ii) the objectives and anticipated results over the period, (iii) the main activities scheduled over the period, and (iv) the key costs and resources scheduled over the period. (1 page maximum).*

*By referring to the updated logical framework matrix[[5]](#footnote-5) (see point 2.3 below), please describe and comment on the extent to which the results have been obtained, if pertinent at this stage, and the probability of the final targets relating to the results being achieved on conclusion of the project.*

*Please state if the intervention rationale is still valid and justify any possible changes.*

*Please state any change that should be made to the logical framework matrix and briefly explain why [the full explanation must be provided in the following section under the relevant point (results, outputs, activities)].*

*2.1.2 Summary of challenges*

*Please state the main developments (activities and results) to project implementation by highlighting the main problems encountered, the solutions adopted and the lessons learned (1 page maximum).*

* 1. **Results and activities**

*How do you assess the results obtained to date? Include your observations on the execution and production of outputs, results and impacts and state if the project has had unexpected positive or negative results.*

*By referring to the updated logical framework matrix (see point 2.3 below), please comment on the level to which all the results have been achieved based on the current values of the corresponding indicators, in addition to all related activities performed during the reference period.*

|  |
| --- |
| To be inserted if applicable – initiative 5%:  *Describe the factors providing a better understanding of the project implementation context which are likely to have an influence on the project's implementation or results: changes to national strategy, programme changes (diagnostics, coverage, cost responsibility…), epidemiological data, status of research/understanding, changes to the financing approach of the Global Fund in the country, any complementarity/redundancy of the project versus other ongoing or planned projects in the country/region, significant security, political or social developments, change to project team members, current factors concerning the various partners/CCMs and, more generally, any incident likely to affect the project.* |

**Result (R) - «<Result name>»**

|  |
| --- |
| To be inserted if applicable – initiative 5%:  *Describe the activities and results obtained for each specific objective of the project.*  *Four points must be developed for each specific objective:*  *- Detailed description of the activities carried out, notably by specifying the methodology used and the dates/periods of the activities carried out, the data collected (type, quantity), including the resources and tools used, the sites in question and analysis performed.*  *- Description of the training activities (continuous training, organization of workshops): dates, places, contents, participants and impact*  *- Description of the scientific results, notably the main results of the analysis performed.*  *All additional documents (reports, specific papers, analytical results, maps, guides, tools, publications, training modules, etc.) must be appended to the report.*  *- Comparison between the activities performed and the activities as planned (if possible, estimate the percentage progress of the activities/research protocol), and explain any variances.*  *- Comparison between the results obtained and results as anticipated (here you must explain the various indicators of the logical framework).*  *- Has the research protocol as appended to the Contract and submitted to the Ethics Committee been adhered to?*  *- What ethical issues have been encountered during the activities performed during these six months and what action have you implemented in response?* |

*<comment on the current levels of the indicators corresponding to the result and explain all changes that have taken place, mainly any lowering of performance; please refer to the assumptions in the logical framework>*

**As applicable, Intermediate Result 1 (IR 1) - «<name of Intermediate Result 1>»**

**(…)**

**Output 1.1 (Output 1.1)**

**(…)**

*<after assessing the above results, please specify all activities/subjects covered and implemented>*

**A. ACTIVITIES**

**Activity 1.1.1**

*<please describe the problems – e.g. delayed, cancelled, deferred activities – that have emerged and how they were resolved> (as applicable)*

*<please list the risks which could have compromised the implementation of certain activities and explain how they were responded to> (as applicable)*

**Activity 1.1.2**

***<…>***

**B. PROJECT MANAGEMENT**

* 1. Budget utilization

*Compare the forecast budget for the 6-month period with expenditure actually incurred. Explain any variances.*

* 1. Organization and human resources

*Describe the material and human resources employed for project implementation*

* 1. Management, control and evaluation

*Describe the evaluation-monitoring activities implemented (e.g. steering committee, monitoring assignments in the field, scheduling meetings with partners, list of tools used, audits, etc.)*

**C. CONSTRAINTS, SOLUTIONS AND LESSONS**

*What are the strengths, weaknesses, progress/constraints encountered during project implementation in these three areas?*

*What constraints/problems have been encountered to date? What measures have been taken (or will be taken), and by whom, to resolve such issues?*

*Have the identified risks been encountered or avoided? What preventive or corrective measures have been implemented or planned? Have any new risks been identified?*

* 1. State if the project will continue after the aid provided by Expertise France has finished. Is any monitoring of activities being planned? Who will ensure the durability of the project?
  2. Present an updated logical framework matrix, showing any changes. Where the schedule includes reference points (intermediate target values), the updated logical framework matrix should be used to compare the progress achieved as at the report date with the corresponding values stated in previous reports (as applicable), and with the corresponding reference points and the final target.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **LOGICAL FRAMEWORK OF THE PROJECT** | | | | |
|  | **Intervention**  **logic** | **Objectively verifiable**  **implementation indicators** | **Verification**  **sources and means** | **Assumptions** |
| **General**  **objectives** |  |  |  |  |
| **Specific**  **objective** |  |  |  |  |
| **Anticipated**  **results** |  |  |  |  |
| **Activities**  **performed** |  |  |  |  |

* 1. Explain how the project has integrated transversal issues such as human rights, democracy, good governance, children’s rights, indigenous populations’ rights, long-term environmental protection and the fight against HIV/AIDS (if a high incidence in the country or target region).
  2. How and by whom have the activities been monitored/evaluated? Please summarize the findings of feedback received, including from beneficiaries and other parties.
  3. What has your organization and any other party participating in the project learned from the project and how has this experience been exploited and disseminated?
  4. Please list all documents (and the number of copies) produced during the project, regardless of the format (please attach a copy of each, unless already sent in the past).

*Please state how the documents produced are circulated and to whom.*

* 1. Please list all the contracts (works, supplies and services) awarded for the implementation of the project since the last intermediate report (as applicable) during the reference period, stating for each the contractor name and providing a brief description of how they were selected.

1. **Beneficiaries, affiliated entities and other cooperation**
   1. How do you assess the relations between the beneficiaries and partners of this grant contract? Please provide specific information for each beneficiary/partner.
   2. Is it being planned to continue the above agreement between signatories of the grant contract? If yes, how? If no, why not?
   3. How do you assess the relations between your organization and the public authorities in the project country? How have these relations affected the project?
   4. As applicable, describe your relations with any other organization taking part in project implementation:

* Associate(s) (if any)
* Co-contractor(s) (if any)
* End beneficiaries and target groups
* Other third parties involved (including other donors, other government agencies or local government entities, NGOs, etc.).
  1. As applicable, describe the links and synergies you have established with other projects.
  2. If your organization has previously received other grants from Expertise France with the objective of supporting the sale target group, to what extent has this project been able to enhance/supplement the others? (List all pertinent previous grants from Expertise.)
  3. How do you assess the cooperation with the various departments of Expertise France?

1. **Visibility**

How is the visibility of Expertise France’s contribution being achieved during the project?

**Expertise France may wish to publish the results of projects. Would you have any objections to this report being published on the Expertise France website? If so, please explain your objections.**

1. **Archiving location of files, accounting records and supporting documentation**

Please provide a table stating where files, accounting records and supporting documentation are archived for each beneficiary and affiliated entity authorized to incur costs.

Name of the contact person for the project: ……………………………………………

Signature: ………………………………

Place:

Report due date: ……………………..

Report submission date: ………………………………..

1. The “target groups” are the groups/entities for which the project will have a direct and positive contribution with regard to the objective of the project, and the “end beneficiaries” are those who benefit from the project in the long term at the level of society or the sector in general. [↑](#footnote-ref-1)
2. The terms used (results, outputs, indicators, etc.) are defined in the model logical framework matrix, appended to the guidelines produced for applicants. [↑](#footnote-ref-2)
3. The plan must cover the financial period between the intermediate report and the next report**.** [↑](#footnote-ref-3)
4. The “target groups” are the groups/entities for which the project will have a direct and positive contribution with regard to the objective of the project, and the “end beneficiaries” are those who benefit from the project in the long term at the level of society or the sector in general. [↑](#footnote-ref-4)
5. The terms used (results, outputs, indicators, etc.) are defined in the model logical framework matrix, appended to the guidelines produced for applicants. [↑](#footnote-ref-5)