## **Narrative Report 2023, project no: 60XXX**

**The report shall be sent to *Union to Union* by 1 March 2024.**

|  |  |
| --- | --- |
| **Project/program title** | **Write here** |
| Swedish union(s) | Write here |
| Global Union Federation (GUF) | Write here |
| GUF’s (Sub) Regional office | Write here |
| **Agreement holder organisation** | **Write here** |
| Person submitting the report | Write here |
| E-mail | Write here |
| Report submitted on date: | Write here |

**The total report must include:**

1. **Narrative report** on results and financial outcome 2023 (*this document*)
2. **Follow up of the project’s objective matrix** 2023 (free format)
3. **Activity matrix** 2023 (Excel-file from application)
4. **Financial outcome and transfers** on the *Union to Union* template (Excel-file from application)
5. **Transfer\_Details\_2023** on the *Union to Union* template
6. **Partner Organisation** contact information (if revised from application)

and

1. **Auditor Report** according to ISA 800/805 including the financial outcome on the *Union to Union* template (excel-file from application) signed by the auditor
2. **Audit Report on factual findings according** to ISRS 4400 signed by the auditor
3. **Management Letter** from auditor to Agreement holder organisation
4. **Management Response** by Agreement holder organisation on Management Letter (shall be submitted no later than 15 March 2024).

**Summary of the results**

***Summarise for communication purposes what the project partners have achieved so far in this project.***

Write here

**Background and analysis**

# Context

Please summarise the relevant changes that had an impact on project’s implementation and progress towards the project’s objectives. Describe per country and region (for regional and global projects).

Write here

# Progress in achieving the project objective and expected results

Please look back at the objectives and the expected results (“changes”) of your project and the activities conducted during the reporting period. Refer to your organisation’s own monitoring plan. Provide answers per country, region, and/or target group the project reached directly and indirectly.

### Observable changes

1. What changes do you see because of your work so far?Are there any unexpected changes? Are there changes that were expected but have not happened?

Write here

1. In your own words describe how significant the changes are for the progress towards the project’s objective? Can you compare the change to the baselines?

Write here

### Lessons learned and evaluations

1. Look over the assumptions that you identified at the planning stage. Are your assumptions about the context, the stakeholders, and the project’s strategies still valid?

If not, have you reflected upon revisions in your strategies?

Write here

1. Implementing partners in different countries might be contributing to different parts of your project’s strategies and different expected results. Look at the countries and partners you have planned to engage with – is everyone on track as planned?

If not, have you reflected upon any revisions? Name specifically changes among local partners.

Write here

1. Have you identified any other lessons learned from the reporting period that you will apply next year?

Write here

1. Please attach any internal/external evaluations or mappings carried out during the reporting period. How do the project partners use the outcomes/recommendations of these evaluations/mappings?

Write here

# Integration of development perspectives

Please elaborate whether the changes described in section 2 have bearing on the development perspectives below. Did the project have any other, unexpected/unplanned effects that contributed to the development perspectives?

### Poverty reduction and poor people’s perspectives on development

*Gender equality is a cross-cutting perspective. Please include it in your answers.*

1. Did the project contribute directly or indirectly to improved life and work situation of a particular group(s) living in poverty, and/or vulnerable in other aspects (for example, migrant women and men workers, women in informal economy, LGBTI+[[1]](#footnote-1))? Give an example.

Write here

1. Did the project contribute directly or indirectly to regulatory frameworks (laws and regulations), co-determination in decision-making processes that affect working conditions, human rights and freedoms, voice and security of people living in poverty? Give an example.

Write here

### Gender equality

1. Did the project contribute directly or indirectly to positive changes concerning gender equality, including LGBTI+? Give an example.

Write here

1. Did the project contribute to improved gender equality within the participating unions on the local level? Give an example.

Write here

1. How did you take gender mainstreaming into account in the project’s monitoring and learning?

Write here

### Environmental and climate perspectives

You can describe here if and how the project partners engaged in issues related to green jobs and decent work agenda; participated in sustainable development discussions; developed internal “green” office policies or climate change policy; included environmental and climate change issues in the internal education and trainings programmes; elaborated risks to own operations connected to climate change and so on.

*Gender equality is a cross-cutting perspective. Please include it in your answers.*

1. Did the project contribute directly or indirectly to a change in awareness, knowledge and/or skills in regard to environmental and climate change issues within the participating unions?

Write here

1. How did you take environment/climate mainstreaming into account in the project’s monitoring and learning?

Write here

### Conflict

*Gender equality is a cross-cutting perspective. Please include it in your answers.*

1. Did the project and the project partners contribute directly or indirectly to the conflict resolution processes, reconciliation or other aspects of peace building and dialogue in the countries affected by conflicts or countries in the post-conflict state?

Write here

# Risk management

Summarise how the risks were managed during the reported period.

### Occurred risks

* Did the occurred risks affect the project’s progress towards objectives?
* If yes, please describe how the effects were mitigated.
* Did project partners draw any lessons from how they managed the risks?

Write here

### Review of the risk matrix

* Has the project’s risk matrix been revised?
* How often do the project partners review the risk matrix and at what occasions?

Write here

If the risk matrix has been revised, please attach it to the report.

**Financial outcome**

# Budget revisions

List considerable changes in relation to the project budget and refer to the correspondence with *Union to Union* (date, project officer, budget lines etc.)*. These changes should correspond to the Excel file.*

Write here

# Financial outcome analysis

1. Comment on the financial outcome **in relation to the original budget** in the agreement(reallocations of funds, activities carried out or omitted, major cuts etc.) taking into consideration items listed 5, Budget revisions.

Write here

1. Elaborate on the outcome per cost type if the deviations are 10 % or more.

Write here

1. Please sum up costs that are reported on levels 2, 3 and/or 4 which directly support local partner’s implementation of the project. This will help *Union to Union* to estimate more correctly how much support reaches local partners on level 5 who for some reasons cannot record these costs themselves.

Write here

# Agreement holders in the project

1. Comment on whether there has been any change of agreement holder partners during the project period.

Write here

1. Any comments on agreement holder partners on subsequent levels, quality of their financial reporting and audit.

Write here

# Transfers received and sent

Please use the Appendix “Transfer\_Details\_2023.xls” and **only** **add the narrative comments here**.

* Fill in the amounts requested and received (in the project chain with an Agreement for transfer of funds (not cost reimbursements) including audit of those funds).
* Add more lines of there are more than three transfers during the year.
* Write which currency the transfer is received in.
* Note the applicable average transfer rate.

Please note that the summary of the transfers and average transfer rates below correspond to the “Budget and Outcome” and “Transfer and Balance” sheets in the Financial Report Excel file.

Level 2/3: Transfers from *Union to Union* **to Agreement partner (Swedish Affiliate/GUF)**:

Write here

Level 4: Transfers from GUF to **Regional GUF**:

Write here

Level 5: Transfers from Regional GUF **to local partners** with local agreements.

Write here

# Exchange rate gains or losses

Comment on any impact from the currency exchange rate deviations on the outcome of the project costs.

Write here

Comment on the exchange rate gain or loss **in the closing balance** for each level. Has any application or approval been made during the year to utilize any gains?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Outgoing balance (currency)** | **Value at average transfer rate (SEK)** | **Value at end of year rate (SEK)** | **Gain / loss (SEK)** |
| 2.Swe Aff |  |  |  |  |
| 3.GUF |  |  |  |  |
| 4.GUFReg |  |  |  |  |
| 5.Local |  |  |  |  |

Write here

# Additional comments

1. Do you have funding from other donors for this project? Whom and how much?

Write here

1. Additional comments or information on the Financial Report, Audit, Management Letter etc.

Write here

1. LGBTI+: lesbian, gay, bisexual, transgender and intersex persons, <https://lgbtiworkers.org/> [↑](#footnote-ref-1)