MID-TERM REPORT

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**B2 MEDIUM-SIZED PROJECT**

**B3 LARGE-SCALE PROJECT**

**To be submitted roughly halfway through the project**

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| **Disability Fund ref. no.** |  |
| **Danish applicant organisation**(Primary grant holder) |  |
| **Contact person** | Name:Email address:Telephone no.: |
| **Other Danish partner(s):**(if relevant) |  |

|  |  |
| --- | --- |
| **South Partner(s)** |  |
| **Country(ies)** |  |
| **Project title** |  |
| **Time period** | Project period: | Period covered by report: |
| **Budget (DKK)**  | Amount granted (DKK): | Expenses (not audited) (DKK) during reporting period: |
| **Expenses** Actual vs. budget at this time | [ ]  Lower[ ]  Approx. as budgeted[ ]  Higher |
| **Progress** | [ ]  All / most project activities delayed[ ]  Partly delayed[ ]  Approx. according to plan[ ]  Fully or partially in advance |

|  |  |
| --- | --- |
| **Language preference for response from DPOD** | [ ]  Danish[ ]  English |

# Explanation

**Timing of midterm reporting**: vor A mid-term reporting should be undertaken **once during a projects lifetime – approx. half-way through the project period**. We recommend that you submit on March 15 instead of an annual results sheet. But if you wish to do the midterm reporting at another time of the year, please organise with your DPOD advisor. The aim is for the mid-term review to take place at a time that fits with and contributes to the existing project cycle processes. For example, it might be an advantage if the reporting is done following a monitoring visit, as a follow up to a mid-term review or preparation for a project evaluation.

**Time period covered:** The report should cover the period **from project start to the reporting date**.

**Purpose:** The information and reflections you provide are important and serve several purposes. **First and foremost to assess how the project is progressing** – what has been achieved so far, lessons learnt – good or bad, and whether this calls for adjustments to the project or the collaboration. **The purpose is also to demonstrate how the Danish member organisation monitors, supports and collaborates** with their South partner(s) in relation to the project. The report is an important part of the documentation of the project. It is also part of the Danish organisation’s track record and consequently plays a part in future assessments of applications to the Danish Disability Fund.

**The mid-term report is made by:** a written and a verbal part.

**The written part** consists of:

* This report (can be filled out briefly and elaborated during meeting)
* Annexes (see Section II).

**The verbal part** consists of a meeting between the project manager from the Danish member organisation as well as your DPOD advisor and possibly DPOD’s controller. We also encourage the South partner(s) to participate where appropriate. Alternatively, it is possible to arrange a mid-term meeting with representatives from two or more compatible projects.

**If a mid-term review has been carried out**, it will play an important role for the mid-term meeting which can mainly focus on your management response.

**Notes from Midterm meeting**: At the meeting, the DPOD advisor may take additional notes which will be shared with meeting participants and included as part of the documentation related to the grant.

**NOTE**: For the sake of clarity and brevity of the report, please delete these instructions and those at the end of the document before submitting the report.

# Part I: Report

## Answer briefly /with bullet points – and elaborate at the meeting if required

## Context and overall progress

### How is the project progressing overall?

#### Are there delays, unforeseen challenges or new opportunities?

#### Have there been any changes to the context – political, economic or social changes in the partner country(ies) of relevance to the project?

#### Have there been any significant changes to the North or South partner organisations, or any challenges in the collaboration, which affect the project?

### Follow-up on risk analysis (Only B3 projects over DKK 5 million)

#### Please submit an updated version of your risk management plan (see explanation for Annex 4).

#### Briefly describe the key considerations you have had regarding risks and how to address them.

## Progress and reflections on each of your project goals

**Goal / outcome 1: Please insert name of your first project goal / objective / outcome here**

### Most important changes/outcomes achieved.

#### You have already described selected key results/outcomes in your Annual Results Sheet(s). Are there other key results to be added to get a more complete picture of achievements associated with goal 1 of your project? If so, please describe:

### To which extent are you reaching the target groups you expected to reach as part of goal 1?

### What have been the main challenges in relation to goal 1? Have your assumptions been confirmed?

### Is there a need to make adjustments to the approach, target groups, objectives or anything else in relation to this project goal?

**Goal / outcome 2: Please insert name of your second project goal objective / outcome here**

### Most important changes/outcomes achieved.

#### You have already described selected key results/outcomes in your Annual Results Sheet(s). Are there other key results to be added to get a more complete picture of achievements associated with goal 2 of your project? If so please describe:

### To which extent are you reaching the target groups you expected to reach as part of goal 2?

### What have been the main challenges in relation to goal 2? Have your assumptions been confirmed?

### Is there a need to make adjustments to the approach, target groups, objectives or anything else in relation to this project goal?

**Goal / outcome 3: Please insert name of your third project goal / objective / outcome here**

### Most important changes/outcomes achieved.

#### You have already described selected key results/outcomes in your Annual Results Sheet(s). Are there other key results to be added to get a more complete picture of achievements associated with goal 3 of your project? If so please describe.

### To which extent are you reaching the target groups you expected to reach as part of goal 2?

### What have been the main challenges in relation to goal 2? Have your assumptions been confirmed?

### Is there a need to make adjustments to the approach, target groups, objectives or anything else in relation to this project goal?

## Monitoring and evaluation (M&E)

### How does/do the South partner(s) monitor the project (describe the most important monitoring activities / systems) and how is it working (what works well and what could be improved)?

### How do(es) the Danish partner(s) followed up with the South partner(s) on project progress, reflection and results? (progress reports, regular dialogue, monitoring visits, learning workshops, etc.)

### (Only relevant for B3 projects over DKK 5 million, for which mid-term evaluations are a requirement, as well as other projects where a mid-term evaluation has been carried out.) How did you find the quality and usefulness of the mid-term evaluation? (Anything that you found particularly useful or that you would do differently next time?)

## Financial monitoring

### Please submit a budget follow up form – see explanation for Annex 3. Feel free to add explanatory remarks about your expenses here or in the budget sheet.

### Have the project accounts been audited in the partner country during the project period [[1]](#footnote-1)? If so please indicate when, and how you have adressed any comments made by the auditor: [[2]](#footnote-2).

### Has the Danish organisation undertaken financial monitoring of the South partner(s) during the project period? Please describe:

#### When and how you carried out the financial monitoring (did you use the MANGO handbook or any other tool as a starting point for the dialogue) - briefly state what you covered and with whom):

#### The result of the financial monitoring and whether it resulted in any specific measures:

#### Any plans to perform financial monitoring in the future:

### Has/have the South partner(s) received a visit from DPOD’s controller during the project period? If so, briefly describe what specific measures the South partner(s) has/have taken to address the recommendations and requirements.

1. **Reflection**

### Next time you do a project evaluation what would you like to know more about or understand better?

### How do(es) the North partner(s) contribute to the project and to the development of the South partner organisation(s) (added value).

# Part II: Annexes

## Required for all

### Annual Results sheet

This is only necessary if you are submitting your midterm report on March 15th. If you are submitting your midterm report later in the year, and have already filled an ‘Annual Results Sheet’ in March – you do not need to do so again now.

### Updated results framework / LFA

Please submit an updated results framework (LFA) with two additional status columns:

* **A status column with brief updates** on how the project has progressed / what has been achieved for each indicator at output level and, where possible, at outcome level.
* **A status column with numbers or colours** that provides a simple overview of the project progress / achievements so far. Colour the cell or insert a number for each indicator to illustrate how far you have come in achieving your expected outputs and outcomes:
* 1. Not started yet / no results (orange)
* 2. Partly achieved (yellow)
* 3. Results achieved (light green)
* 4. Achieved more than expected (dark green)

### Expenditure analysis

Please use DPOD’s template for budget follow up. The purpose is to show how project expenditure is developing and distributed between project outcomes / objectives. Feel free to add explanatory remarks about your expenses in the budget sheet.

## Only relevant to B3 projects over DKK 5 mill.

### Updated risk matrix (B3 projects over DKK 5 million)

* Insert an additional status column in the risk matrix and briefly write what measures have been taken to mitigate risks so far (if any).
* In addition, show which changes have been made (eg. in red font) to the risk assessment (new risks added or others become less relevant) + any updates on how to address risks.

### Mid-term evaluation and management response (your response to its recommendations) (B3 projects over DKK 5 million)

For B3 projects over DKK 5 million both a mid-term and a final evaluation must be carried out. Please attach mid-term review report and mgt response / action points.

1. It is not a requirement for the project accounts to be audited during the implementation phase – but is recommended for larger scale projects. [↑](#footnote-ref-1)
2. Auditors often write a Management Letter when an audit has been completed. This document is unrelated to the audit report and is addressed to the Board and managers. A Management Letter highlights the weaknesses identified in the internal control systems and makes recommendations for improvements. The organisation has the option to respond to the comments in the Management Letter and explain / describe how they will react. [↑](#footnote-ref-2)