IMPLEMENTATION SUPPORT AND REPORTING (IPF OPERATIONS)

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PRESENTATION CONTENT

OVERVIEW OF IMPLEMENTATION SUPPORT AND REPORTING

KEY IMPLEMENTATION MILESTONE: MID TERM REVIEW (MTR)

OUR KEY TOOL: IMPLEMENTATION STATUS AND RESULTS REPORT (ICR)

PROCESSING ISR IN OPERATIONS PORTAL
For effective implementation support, a continuous effort is required:

➢ to monitor and assess project progress and results
➢ to manage risks for successful project implementation
➢ to address implementation issues

(Continuously assessing potential project adjustments based on risks, project performance, and evolving circumstances)

As part of this effort, the Bank team:

➢ Advises / Reviews documents / provides no objections
➢ Regular meetings with government / project officials / beneficiaries and other stakeholders
➢ And conducts Site Visits
IMPLEMENTATION SUPPORT: AIDE MEMOIRE

➢ AM is the Bank’s main instrument for written communication with Government / project counterparts following a mission
➢ Generally, its key aspects are:
  ❖ Assessment of progress toward achieving PDOs and implementation progress
  ❖ Identifying key risks and implementation issues
  ❖ Recording agreements for resolving identified and pending issues (through a concrete Action Plan)

Good Practice:
❖ Check whether it will be made public (it generally is, but depends in the Country)
❖ It should be discussed and agreed with the Government. Although the content of the aide-memoire is not negotiated, Bank needs to be sensitive to the Government’s concerns
❖ It should be concise, clear and practical (agile Aide Memoire template is available)

Keep in Mind:
❖ Aide Memoire is generally sent to the Government with a Management Letter
❖ It is a key input for the ISRs
IMPLEMENTATION SUPPORT: REPORTING BACK

➢ Informing Bank Management of project performance, results and risks
➢ Recording due diligence
➢ Ensuring an accurate record of project history and experience (for final evaluation)

Good Practice:

➢ Performance assessment and reports used for corporate monitoring of portfolio and Bank development effectiveness
➢ Making sure that issues are escalated as needed
➢ Seeking advice and decision making on a timely manner (following up and following through)

Changes Coming Soon
QUESTION 1

Which ones are tools / instruments of the Bank's self-assessment system?

1. ISRs
2. Quarterly Portfolio Reports
3. Implementation Completion and Results Reports (ICRs)
5. Aide Memoires
What are tools / instruments of the Bank’s self-assessment system?

**ANSWER**

1. **ISRs**
   - During implementation
   - At closing

2. **Quarterly Portfolio Reports**
   - At closing

3. **Implementation Completion and Results Reports (ICRs)**
   - During implementation
   - For country programs

4. **Country Partnership Framework (CPF) Completion and Learning Reviews**
   - At closing

5. **Aide Memoires**
   - For country programs
What is an MTR?

**MID-TERM REVIEW (MTR): REALITY CHECK**

- Enhanced implementation support mission
- Carried-out before the project midpoint
- Reassessing the Project’s development objective(s) and design
- In depth analysis to respond/adjust to new circumstances
The Mid-Term Review is a key milestone of project implementation support.

It should take stock of project performance and allow to make relevant decisions regarding the future of the operation (including potential restructuring).

**Good Practice:**

- Start planning with sufficient time (ensuring participation of all team members, contracting of required consultancies...)
- Ideally, an independent MTR evaluation report submitted by the Government (draft ready before MTR mission)
- Ensure that M&E system and reporting is working well
- Focus it on opportunities for enhancing Project impact and strengthening ownership and commitment
Timing and Process of an MTR

Timing
- Best if at least 24 months after effectiveness and before disbursements reach 40 percent

Process
- Strategic, operational and institutional levels

Participants
- Task Team, specialized consultants, counterparts, beneficiaries, others

MTR in Project Documents
- In PAD, in Financial Agreement, in Implementation Plan

Outcome of an MTR
- Forward looking and problem solving: Restructuring, Additional Financing, cancellation...
Key Aspects in Conducting an MTR

- Confirm relevance of PDO and of project design (or identify potential changes)
- Ensure that all results indicators are updated with adequate data
- Confirm ratings for PDO achievement and Implementation Progress (IP) – for PDO rating consider the 3 dimensions for evaluation: relevance, efficacy and efficiency
- Identify main issues influencing project implementation (positive and negative)
- Assess implementation arrangements
- Agree on an Implementation Action Plan, if needed

➢ File the post-MTR ISR as soon as agreements have been reached with the Government (and process any agreed restructuring in a timely fashion).
MTR in the Portal
What is an ISR?

When is it Required?

An ISR is required for:

- All operations that follow IPF procedures (IDA/IBRD and all RETFs)
- All Program for Results (PforR) operations
- Programmatic DPOs when the period between approval of individual operations exceeds 12 months

This Clinic focuses on ISRs for IPF Operations
How often should you do an ISR?

- First ISR no later than 3 months after Board approval
- Submit ISR every 6 months or as necessary
- No ISR is required in the last 3 months of Project implementation
ISRIs provide information for the following:

- **Program/project management** by Country and Practice Managers
- **Task Teams** to seek guidance and support from management
- **Portfolio monitoring** by Regions, Global Practices, and the Bank’s senior management
- **Completion reporting** on projects
- **Ex-post evaluation of projects** by the **Independent Evaluation Group (IEG)**
- **Disclosure** of project implementation status to the Public
Ensuring ISR quality

Key Questions to Ask

Is the project **on track** to achieve its Project Development Objective (PDO)?

Are there **significant issues** affecting implementation?

What **critical actions** need to be taken (by client and/or Bank Management) to improve implementation?

Are there **risks** that jeopardize implementation?
+ Likelihood of PDO achievement and Implementation Progress
+ Progress of Project Components

+ Specific aspects critical for the project:
  - Financial Management, Project Management, Procurement, Monitoring and Evaluation (and counterpart funding, when applicable)
  - Compliance with safeguards and legal covenants
  - Disbursements

+ Current Risks (reflected in Systematic Operations Risk-rating Tool or SORT)

+ Evidence-based progress on RESULTS
Assessing the PDO

Likelihood of the achievement of the PDO is forward looking. Rating based on the likelihood of achievement of the PDO by the closing date and consistent with implementation progress.

Consider **efficacy** (achievement of PDO/results), **relevance** (of PDO and project design), and **efficiency** (economic rationale) for rating PDO particularly at later stage of implementation.
Assessing Implementation Progress (IP)

**Ratings of IP** should reflect the current progress status, be internally consistent and evidence-based (Upgrading of IP is based on concrete improvement, not expectations and promises)

- **Specific implementation ratings** (financial management, project management, counterpart funding, procurement, and M&E)
- **Compliance** with applicable safeguards, fiduciary requirements (including audits), and legal covenants
- Actual progress on project components/activities
- Actual disbursements compared to estimates
**QUESTION 2**

What happens to the Project if PDO Achievement and/or IP Progress is rated MU or lower?

1. The Project is categorized as a Problem Project
2. The Bank starts process of suspension of disbursements
3. Project is put in a corporate risk list as a potential problem project
4. Project team is congratulated for their openness and candor
What happens to the Project if PDO Achievement and/or IP Progress is rated MU or lower?

**ANSWER**

1. The Project is categorized as a Problem Project
2. The Bank starts process of suspension of disbursements
3. Project is put in a corporate risk list as a potential problem project
4. Project team is congratulated for their openness and candor

Team should take “pro-active actions”:
- upgrading
- closing
- canceling >=20%
- suspending
- restructuring
Assessing Key Aspects of Project Implementation

Rating Progress of Project Components

- Individual ratings given to each component
- Assessing progress of activities and delivery of outputs in relation to implementation plan
- Consider progress on intermediate indicators
- Ratings by component should be generally consistent with the overall IP rating (For example if 3 out of 4 components are rated MS, the overall IP rating of the project should probably be MS.)
Assessing Key Aspects of Project Implementation

**Project Management**
- Institutional arrangements are adequate (including, when applicable, inter-institutional coordination)
- Staff with the necessary qualifications, skills, and authority are in place to ensure effective project management
- Attention is given to project issues and its resolution

**Procurement**
- The procurement rating measures the quality, reliability and transparency of procurement administration for the project
- Procurement Specialist for the project advises on the procurement rating

**Financial Management**
- The project’s FM rating is based on the adequacy of arrangements and capacity for financial planning and budgeting, funds flow and disbursement arrangements, internal controls, accounting, financial reporting, and auditing.
- FM ratings is provided with advice from the FM Specialist (and linked in the ISR to the PRIMA assessment)

**M & E**
- An appropriate M&E system is in place to report on Project results (as laid out in the PAD)
- There is capacity to implement the M&E system, allowing to collect and report on data related to results
- The data/information produced by the M&E system is being used effectively in planning, decision-making and strategic purposes.
This Section of the ISR is the main tool for communicating with management to obtain advice and confirm decisions:

- Be brief, candid and focused on priority issues and actions (no need to cut and paste Aide Memoire)
- ISSUES should be openly identified and correctly summarized
- ACTIONS should be relevant to key issues and succinctly described (by whom, target date)
- If PDO and/or IP rating is Moderately Unsatisfactory (MU) or below, identification of issues and actions becomes more critical

This Section is not disclosed to the Public
Are the current ratings of PDO and IP consistent with the progress reflected in the rest of ratings?

1. Yes
2. No
3. Yes, but it could be explained better

<table>
<thead>
<tr>
<th>1. Ratings</th>
<th>Previous Rating</th>
<th>Current Rating</th>
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</thead>
<tbody>
<tr>
<td>Progress towards achievement of PDO</td>
<td>Satisfactory</td>
<td>Satisfactory</td>
</tr>
<tr>
<td>Overall Implementation Progress (IP)</td>
<td>Moderately Satisfactory</td>
<td>Moderately Satisfactory</td>
</tr>
<tr>
<td>Component A</td>
<td>Satisfactory</td>
<td>Moderately Satisfactory</td>
</tr>
<tr>
<td>Component B</td>
<td>Moderately Satisfactory</td>
<td>Moderately Unsatisfactory</td>
</tr>
<tr>
<td>Financial Management</td>
<td>Satisfactory</td>
<td>Satisfactory</td>
</tr>
<tr>
<td>Project Management</td>
<td>Moderately Satisfactory</td>
<td>Moderately Satisfactory</td>
</tr>
<tr>
<td>Procurement</td>
<td>Moderately Satisfactory</td>
<td>Moderately Satisfactory</td>
</tr>
<tr>
<td>Monitoring and Evaluation</td>
<td>Moderately Satisfactory</td>
<td>Moderately Satisfactory</td>
</tr>
</tbody>
</table>

Comments
Progress continues on achieving results and meeting key results indicators of the Project. Government decided not to implement component B (MIS upgrade). It has been downgraded to MU. Continued delays in project activities and critical procurement.
## 1. Ratings

<table>
<thead>
<tr>
<th>Component</th>
<th>Previous Rating</th>
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<tr>
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<tr>
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<td>Moderately Satisfactory</td>
</tr>
<tr>
<td>Component A</td>
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<td>Moderately Satisfactory</td>
</tr>
<tr>
<td>Component B</td>
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</tr>
<tr>
<td>Financial Management</td>
<td>Satisfactory</td>
<td>Satisfactory</td>
</tr>
<tr>
<td>Project Management</td>
<td>Moderately Satisfactory</td>
<td>Moderately Satisfactory</td>
</tr>
<tr>
<td>Procurement</td>
<td>Moderately Satisfactory</td>
<td>Moderately Satisfactory</td>
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<tr>
<td>Monitoring and Evaluation</td>
<td>Moderately Satisfactory</td>
<td>Moderately Satisfactory</td>
</tr>
</tbody>
</table>

### Comments

Progress continues on achieving results and meeting key results indicators of the Project. Government decided not to implement component B (MIS upgrade). It has been downgraded to MU. Continued delays in project activities and critical procurement.
Monitoring Compliance

Reporting on and Rating Safeguards

- Each safeguard triggered by the Project is rated (with advice from safeguard specialists in the team)
- Comments should be given if there is a rating change, or there is an emerging/ongoing issue that needs to be monitored.
- The lowest rating of one of the safeguards is automatically assigned to the overall Safeguards rating
- If there are emerging issues and risks related to safeguards, even if no changes are considered necessary yet to performance or risk ratings, make sure to report it in the ISR
Legal Covenants

➢ Status of compliance with legal covenants that are critical for PDO achievement (e.g., safeguards, project implementations requirements, etc.) is provided (flow directly from the PAD)

➢ If there are legal covenants missing, it is possible to add them in the first or subsequent ISRs

➢ However, amending or dropping any legal covenants needs restructuring
Monitoring Risks

Reporting and Monitoring Risks

➢ The Systematic Operations Risk-rating Tool (SORT) is a tool for continuous assessment of risks of achieving PDO

➢ First risk assessment conducted during project preparation, and SORT ratings confirmed at appraisal

➢ Continuous risk monitoring, assessment and reporting is one of the most critical aspects of implementation support (but a blind spot in many ISRs)

➢ When relevant, the risks should be updated and ratings and comments provided in the ISR

➢ Fiduciary and social and environmental risks are advised by the respective specialists in the Project team
Monitoring Results

Results Framework is automatically imported from the PAD in the first ISR (changes in scope, baselines, and end targets require a formal restructuring)

ISR results should record progress towards targets as per M&E Plan

Results Indicators

➢ The PDO indicators should measure all aspects of the PDO.
➢ Intermediate Results indicators should be relevant to the PDO and linked to project components.

Baselines & targets

All indicators are required to have baselines & targets. Important to separate baseline zero (value is zero) from absence of data (no value) and use correct unit of measurement.

➢ Comments recommended to clarify progress toward targets, or explain delays in measuring indicators, etc.
## Disclosable ISR vs. Internal ISR

<table>
<thead>
<tr>
<th>SECTION</th>
<th>DISCLOSED</th>
<th>NOT DISCLOSED</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Information</td>
<td>• Basic Information (Name, Region, Country, Dates, Lending instrument, PDO, Component names)</td>
<td>TTL and Team members</td>
</tr>
<tr>
<td></td>
<td>• Organizations</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Financing Performance (key dates, amounts, disbursement)</td>
<td></td>
</tr>
<tr>
<td>Management &amp; Key Decisions</td>
<td>Project Status for Public Disclosure</td>
<td>Key Issues and Actions for Management Attention</td>
</tr>
<tr>
<td>Compliance</td>
<td></td>
<td>All</td>
</tr>
<tr>
<td>Risk</td>
<td>All ratings disclosed</td>
<td>Comments section on Risks</td>
</tr>
<tr>
<td>Project Ratings</td>
<td>Summary Ratings for IP, DO, and Overall Risk</td>
<td>Other ratings</td>
</tr>
<tr>
<td>Results</td>
<td>All including comments</td>
<td></td>
</tr>
</tbody>
</table>
Implementation progress with regard to achieving the PDO should be explained well, taking into consideration the following:

- Demonstrate how likely is that the PDO will be achieved.
- Report on results, not processes (such as procurement, consultants, disbursement, and effectiveness).
- If it still early to report on results, then link reporting on activity implementation to the likelihood of achievement of the PDO.
- List only key issues and decisions which are not considered restricted / confidential.
- Keep the information short and focused. Use language that the general public can easily understand.
Processing ISR in Operations Portal

Click here for recent enhancements in Operations Portal, including ISR
Processing ISR in Operations Portal

**FIRST STEP**
- TTL/Task Teams completes ISR datasheet
- TTL/Task Teams adds supporting documents (Aide Memoire, Management Letter, and other relevant docs)
- TTL/Task Teams recommends the ISR

**SECOND STEP**
- CD provide advice or return for revision (up to 5 business days)
- PM decides or return for revision (up to 5 business days)

**THIRD STEP**
- ISR is archived and disclosed after PM decision
- If no action is taken by PM, ISR is automatically archived and disclosed after 5 days

Changes Coming Soon
How to create an ISR

NB: ISR will be pre-populated with some information from Core Data, iLAP and previously archived ISR, if any.
How to create an ISR

Due to scheduled SAP-related systems maintenance, Operations Portal will be unavailable from 20:00 P.M. Friday, August 17, 2018 until 09:00 A.M. on UTC/GMT -4. Please plan accordingly to minimize the impact on your work.

Task teams can now group indicators around results areas and components in the ISR. Learn more about other enhancements for financing and Adviso.

DEVELOPMENT OBJECTIVE

The proposed project development objectives (PDGs) are: (a) to increase access to electricity; (b) to improve reliability of electricity service; and (c) to strengthen KPLC’s financial situation.

PROJECT RATING $
How to create an ISR
Objective and Ratings

PDO, IP and Components

NB: The last ISR before project closing will be used as reference by IEG and Corporate Reporting (“Net Disconnect”).
Disbursements

Disbursement information is pre-populated directly from the Loans system (iLap)
QUESTION 4

You need to do a Restructuring to formally revise Disbursement Estimates.

True or False?
Disbursement Projection Tool

*If Disbursement Data needs to be updated go to CORE DATA

NB: Formal revision of disbursement estimates for IPF operations no longer requires restructuring.
Missions, Aide Memoires and Management Letters

NB: You can file an ISR at anytime even if you have not held a mission.
Compliance: Safeguards

Countercheck to ensure all the policies triggered in the ISDS are listed here.
## Compliance: Legal Covenants

![Compliance: Legal Covenants](image)

### LEGAL COVENANTS

<table>
<thead>
<tr>
<th>Loan/Credit/IF</th>
<th>Description</th>
<th>Status</th>
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</thead>
<tbody>
<tr>
<td>IDA-59870</td>
<td><strong>Finance Agreement:</strong> The Kenya Power and Lighting Company Limited’s (KPLC) Financial Strategy. <strong>Description:</strong> KPLC shall, no later than six months after the Effective Date, adopt, in form and substance acceptable to the Association, a financial strategy to strengthen its balance sheet and manage its capital investment program in a sustainable manner. <strong>Due Date:</strong> 31-Dec-2015</td>
<td>Complied with</td>
</tr>
<tr>
<td></td>
<td>IDA-59870 Finance Agreement: KPLC Project Implementation Unit (PIU) Project. <strong>Description:</strong> KPLC shall establish by no later than two months after the Effective Date and maintain thereafter until the completion of Components A, B, C1, and D1(d) of the PIU Project, a Unit under terms of reference and with staff in numbers and with qualifications satisfactory to IDA. <strong>Due Date:</strong> 31-Aug-2015</td>
<td>Complied with</td>
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<td></td>
<td>IDA-59870 Finance Agreement: Rural Electrification Authority (REA) PIU Project. <strong>Description:</strong> REA shall establish by no later than two months after the Effective Date, and maintain until the completion of the Project, a PIU under terms of reference and with staff in numbers and with qualifications satisfactory to IDA. <strong>Due Date:</strong> 31-Aug-2015</td>
<td>Complied with</td>
</tr>
</tbody>
</table>

*Note: The description in ISIR is a summary; teams should refer to actual legal agreement for details.*
SORT Ratings in the Portal

NB: Environmental and Social ratings (from IRT) should be updated by the Project’s Safeguards Specialists. This is done from the IRT page. Go to the Roadmap page and check under TOOLS on your right panel.

<table>
<thead>
<tr>
<th>Risk Category</th>
<th>Rating at Approval</th>
<th>Previous Rating</th>
<th>Current Rating</th>
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<tbody>
<tr>
<td>Political and Governance</td>
<td>Substantial</td>
<td>Substantial</td>
<td>Substantial</td>
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<tr>
<td>Microeconomic</td>
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<td>Moderate</td>
<td>Moderate</td>
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<tr>
<td>Sector Strategies and Policies</td>
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<td>Moderate</td>
<td>Moderate</td>
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<tr>
<td>Technical Design of Project or Program</td>
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<td>Moderate</td>
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<td>Institutional Capacity for Implementation and Sustainability</td>
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<td>Social Risk rating from IRT</td>
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<td>Substantial</td>
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</table>

Stakeholders

Other

If Satisfied, please describe in the comments box below

Overall
Results Framework

Map Indicators

**New**

Map PDO indicator(s) to Objectives/Outcomes, and intermediate indicators to Components

Note: Please ensure that there is at least one objective/outcome or component and then click on the map indicators button below.
Results
Framework

Mapping Indicators

Drag and drop feature. Allows one to map and reorder the indicators easily.
Project Components Pre-populated. You just need to select and map.
Results Framework

Results Matrix: Non-editable (view only) page. View all your mapped PDO and Intermediate indicators in one page.
Results Framework

Updating the intermediate targets, and other details. First map the indicators then click on the indicators.

NB: Intermediate targets are optional.

## RESULTS

### INTERMEDIATE RESULTS INDICATORS BY COMPONENTS

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<tr>
<th>ACTUALS</th>
<th>Value (Number)</th>
<th>Date</th>
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<tr>
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<td>30-May-2018</td>
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<tr>
<td>Actual Previous</td>
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RESULTS

INDICATIVE TIMELINE FOR DLI ACHIEVEMENT

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<th>Period</th>
<th>Indicator Name</th>
<th>Unit of Measure</th>
<th>Baseline</th>
<th>Actual (Current)</th>
<th>Test 2</th>
<th>Lucy</th>
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<tr>
<td>Ppared 1</td>
<td>DLI Test 1</td>
<td>Dollars</td>
<td>4,156.30</td>
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Quick access to Approval’s page from the ISR. Click on this icon.

<table>
<thead>
<tr>
<th>Financial Management</th>
<th>&lt;= 4 months</th>
<th>&gt;= 4 months</th>
<th>&gt;= 9 months</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overdue Reports</td>
<td>---</td>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td>Financial Statement - Audit</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>&lt;= 30 days</td>
<td>31 - 60 days</td>
<td>&gt;= 61 days</td>
<td></td>
</tr>
<tr>
<td>Interim Financial Reports</td>
<td>2</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

Notes: Include comments in Issues and Actions and/or Other Project Ratings section.
Recalling will reset that specific approval step (i.e., all the clearances and concurrences in that step).

If you do not want to reset the entire approval step, you can request a return for revision from pending approver.

Once package has been approved and archived, recall button is no longer available.

NB: No Conditional Approval. (Approved subject to.....) The only option is to Return for Revision.

Reassign: You can reassign an already submitted ISR to another colleague acting for CD/PM.

Recall button allows already recommended ISR to be recalled into draft.
Useful Resources and Links

Type **OPCS** or **IPF** on your browser for quick access to IPF Procedures and Bank Guidance Notes.

Type **PPF** on your browser to access the Operations Manual as well as other Procedures and Guidance Notes.

**Bank Procedure - Investment Project Financing Implementation Support to Project Completion**

**Bank Guidance - Investment Project Financing: Implementation Support**

**Bank Guidance - Preparing the ISR for Investment Project Financing**

**Bank Guidance - Results Framework and M&E**

**Bank Guidance - Systematic Operations Risk-Rating Tool (SORT)**
THANK YOU

For questions and clarifications, please contact
operationshelpdesk@worldbank.org