

# Completing your quarterly progress report

## Section 1: Overview

Organisation name

Project Title

Start Date

End date

## Section 2: Beneficiaries

**2.1** “Unique direct beneficiaries” are ‘new’ people directly benefitting from the project interventions for the first time in the quarter under review. This number may change each quarter.

**2.2** This is the total number of direct beneficiaries reached in all quarters to date (including the quarter under review) out of the total number targeted by the project.

For example, if the number of unique beneficiaries reached in the quarter under review is 250 and in all previous quarters 750 beneficiaries were reached, this equals 1,000. If the project aims to target 2,000 direct beneficiaries by the end of the programme, this means that 50% of direct beneficiaries have been reached at the point of reporting ( $1,000/2,000 \times 100 = 50\%$ )

**2.3** You must complete and use the beneficiary template provided in the online form, making sure to provide the disaggregation.

## Section 3: Progress

**3.1** This question is two-fold. You should explain what you have done (activities) and what has changed or is improving as a result of what you have done (outputs).

Please do not just provide a list of activities conducted in the quarter, but also describe what these activities achieved and how they contributed to achieving the outputs.

### Bad example

“We conducted three workshops to train households on effective farming techniques”

**Good example**

“As a result of three workshops on effective farming techniques we conducted with 100 households this quarter, 78 are able to farm more effectively. Out of those, 76 have started to implement the training”

**3.2** Identify and describe one key achievement from the quarter, and explain why you think it was particularly important. This can come from a variety of areas such as processes implemented, activities conducted, or changes achieved. The key is to explain why this has been important.

**Good example**

“One main achievement from the quarter was a successful lobbying meeting with the regional minister of health who subsequently sent a letter to all health centres supporting the project. This was very important as it has built the legitimacy of the project with health centres and helped to establish the enabling environment we needed to reach more people”

**3.3** In this section, you need to do two things. First, explain progress against your plan. Look at what was planned for the quarter versus what was carried out and then assess whether you are on track or not in terms of activities.

Try to quantify this in terms of percentages and time. What percentage of your quarterly work plan did you implement and if in your assessment you find you are behind schedule please explain what steps you have taken (or will take) to get back on track.

**Good example**

“We were able to carry out 65% of our planned activities this quarter and are now approximately only two weeks behind schedule.”

Secondly, estimate the progress you have made towards achieving your outputs during the quarter.

If you have provided quarterly output milestones in your logical framework, please report against these.

If you have not, you should provide an educated guess on where you think you are. Use the following categories:

- **On track:** If you believe you achieved exactly what was required to deliver the output during the quarter.
- **Getting there:** If you believe you achieved most (more than 60%) of what is required to deliver the output during the quarter.

- **Off track:** If you did not achieve what was required to deliver the output during the quarter.

## Section 4: Challenges

**4.1** Describe anything that occurred in the quarter under review which negatively affected your ability to implement the project as planned. Explain what actions you took to respond to the challenge and whether these worked or not.

### Good example

“The country experienced a fuel shortage during the quarter which impacted our ability to transport the necessary items to remote rural locations. To address the challenge, we lobbied the government which resulted in us signing an MOU allowing the project to access the government fuel depots.”

**4.2** Update your matrix including any new risks that have emerged and any changes to risk rating for existing risks and challenges. You must use the template provided by Match in the online form. Make sure that your risk matrix includes the challenges and risk you have described in 4.1.

## Section 5: Learning and beneficiary feedback mechanisms

**5.1** You should be constantly reflecting and learning about whether and how well your project is performing. This is important for you to be able to adapt the project to ensure it is relevant, effective and on track to meet its goals. In this section:

- Describe things you have learned during this quarter. You might consider project approaches e.g. what is or is not working for whom, where and why; emerging good or promising practice; or change in the operational context which impacts your project plan/approach, e.g. policy change, conflict or natural disaster
- Explain where this learning came from. This might be your monitoring, evaluation and learning activities, beneficiary feedback mechanisms or context/situation/political economy analysis conducted
- What you have, or plan to do, with the learning to adapt the project.

You are expected to elicit regular feedback from beneficiaries on at least a quarterly basis and so this section should never be left empty. Guidance on [beneficiary feedback mechanisms](#) can be found on the UK Aid Match website.

## Section 6: Compliance

**6.1** Write about anything that you have done in the past quarter with regards to enhanced safeguarding namely:

- Whistleblowing
- Risk management
- Human Resource
- Code of Conduct
- Governance and accountability

For example, you may have updated your policies or given capacity building, inductions for new staff. This should particularly include anything you have done with your downstream partners.

Do not use this as a mechanism to alert us to any fraud/safeguarding issue. Use the [formal mechanisms](#) for this.

**6.2** It is compulsory to register on IATI. You have six months from the signing of the AGA to register. Data should be updated on a quarterly basis. Provide a link to updated data. Guidance on [IATI](#) can be found on the UK Aid Match website.

Generally, your writing should be justified rather than left or right aligned. However, when typing to the side of a picture or a chart, left align your text.

## Section 7: Other

**7.1** Provide any further information you wish to share with us. For instance, you should write about any of the following where relevant:

- Any adaptations to your approach that you have made or are thinking about making in the future
- Capacity building activities that you have completed with staff, volunteers or partners
- Stakeholder coordination (e.g. meetings, round tables)
- Advocacy/lobbying activities
- Communication events (upload reports, photographs, communications materials, case studies)
- Monitoring Evaluation and Learning activities (e.g. data collection, baseline report, learning events)
- Wider engagement that the programme has undertaken during the reporting quarter; e.g. with other CSOs or programmes in the region
- Updates to your sustainability planning
- Knowledge sharing activities (conducting research, presentations, attendance at conferences)
- Unexpected activities or benefits outside the project plan or expectations

**7.2** This section can be used to upload any other relevant documents; for example, photographs, reports, graphs and data. Ensure documents uploaded are labelled clearly and referenced in the narrative in 7.1

## **Section 8: Finance**

**8.1** Have you uploaded your financial report in the template provided? Please use the guidance provided in the system to do this properly

**8.2** Provide a brief description of any +/- variances found on the claim that you have submitted. Explain the reason behind these variances

**8.3** Give a brief description of any changes to your forecasting. Justify those changes.

## **Section 9: Next quarter**

**9.1** Estimate how many unique direct beneficiaries you will reach next quarter.

**9.2** Complete and upload your work plan for next quarter. You must use the template provided in the online form to complete the work plan. In column 1, change the overall status to red, amber or green based on your assessment in 2.4. If you are:

- **90%+**: your status is green
- **70%+**: your status is amber
- **Less than 70%**: your status is red

In column 2, list the activities you conducted in the quarter you have just reported on.

In column 3, list what you will do in the next quarter.

If you have any specific questions relating to quarterly reporting that are not addressed in this guidance document, please contact your PRM and Grants Officer who will be able to assist.