

Guidance for completing your UK Aid Match quarterly narrative report

This guidance follows the quarterly report structure and details what we are looking for in each question or section.

[A Word document template is available to download](#) from the UK Aid Match website, to work on your report offline, however you must complete it on Grantelope for it be accepted. For report and/or claim queries, contact your Performance and Risk Manager (PRM) and Fiduciary Risk Officer (FRO), and for technical or access support, contact the Grantelope team by email: grantelope@mansiondaniels.com.

- **Word Counts:** These have been indicated as a guide only, to support concision and relevance in responding to the questions
- **Fourth quarter reduction:** Details of the reduced fourth quarterly report are included at the end of this guidance.

Section 1: Beneficiaries

1.1 State the total number of unique beneficiaries you have reached since the start of the project against the total project target.

- Beneficiaries reached since the start of the project
- Total project target
- Percentage of total project target reached to date.

This question is looking for the total number of unique and direct beneficiaries reached since the start of the project, including the quarter under review, out of the total number targeted by the project. Please ensure the 'total project target' reflects the overall project target in the approved Beneficiary Data Summary. If these totals do not match, contact your PRM to make an amendment.

Grantelope will auto-calculate the percentage of total project target reached to date.

For example: If the number of new beneficiaries reached in the quarter under review is 250, and in all previous quarters 750 beneficiaries were reached, this equals 1,000. If the total target reach for the life of the project is 2,000 people, this would be $1,000 / 2,000$ which is 50%.

Section 2: Progress

2.1 Describe progress made this quarter against each output.

This question is looking to understand progress made towards the project's workplan and how these results have contributed to achieving the outputs. The emphasis should be on the 'so what' of activities, rather than listing activities conducted in the quarter (as the project budget, financial claim and project workplan already explains clearly the activities).

For example: Rather than, ‘for output one, we conducted three of the four planned workshops to train farmers on climate-sensitive agricultural techniques, and the fourth will be conducted in the following month’, a stronger update on this activity would be, ‘for output one, we delivered three of the four planned workshops on climate-sensitive agricultural techniques this quarter, and each was attended by 100 farmers (including 25% women). Pre and post tests were conducted, and these results are in line with broader Logframe milestones. Routine monitoring visits have been conducted and indicate that around 80% of attendees at each training have started implementing the techniques. This will be monitored, and the full impact assessed in the annual report. Some challenges with the latest workshop have also been noted below (in challenges section) Etc.
(Recommend 200 words per output)

2.2 Describe and explain one key achievement.

Identify one key achievement from the quarter and explain why you think it was particularly important for the achievement of outputs/outcomes. This can come from a variety of areas, including activities or processes implemented or changes achieved as a result. Ideally this is something that is above and beyond business as usual / planned work or has some particularly useful learning or significance which can be shared. Reflect on which strategies have led to this success and what can be learned from it.

For example: One main achievement from the quarter was a successful lobbying meeting with the regional Minister of Health, who the team has been engaging with for several months. Following this meeting, she sent a letter to all health centers confirming their support of the project. This was very important as it has built the legitimacy of the project with health centers and has strengthened the establishment of the enabling environment, we need to reach more people. Positive engagement of the Minister of Health was made possible through significant efforts from the team in ensuring regular communication about project progress and involvement of MoH representatives in the relevant cluster meetings at regional level, and with direct comms with the Minister’s office, sharing quarterly updates... etc.
(Recommend a maximum of 300 words)

2.3 Assess the extent to which you are on track by the end of the quarter.

This question is looking for two things. Firstly, explain progress against your workplan: look at what was planned for the quarter versus what was carried out and then assess whether the project is on track or not in terms of activities delivered. From this, provide analysis of whether the project is on track with activities. It may be helpful to quantify this in terms of percentages and time: for example, estimating the percentage of the quarterly work plan that was implemented (or not) under each output. Where the project is behind schedule, explain what steps have been taken and will be taken to steer the project back on track. This should directly correlate with the information provided in the financial claim, the forecast, and section 7 of the report which asks about variances.

The following range can be used to describe overall progress made in the quarter (noting these % ranges are only a guide):

On track	The project delivered what was planned to achieve the outputs during the quarter (approximately 90% or more)
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Getting there	The project delivered most of what was planned to achieve the outputs during (approximately 65% to 89%)
Off track	The project delivered far less than it planned to achieve the outputs during the quarter (approximately less than 65%)

For example: The project is on 'getting there' in terms of activities delivered against the workplan. For output one, we were able to carry out approximately 70% of the planned activities, with 7 of the 10 planned teacher training workshops delivered. The three that have not been completed have been moved to next quarter, and are scheduled for the first four weeks of the quarter. They were not delivered as the location of the four schools was affected by heavy rainfall and this made the roads impassable. The rains have since eased and this is expected to be ok in the coming weeks. Once these trainings have been completed, we will be able to distribute the materials that were procured in this quarter for the three remaining schools, and move to the next stage of the activity plan... etc. **(Recommend a maximum of 300 words)**

Section 3: Challenges

3.1 Explain the challenges faced in this quarter and how they were addressed.

Describe anything that occurred in the quarter which negatively affected your ability to implement the project as planned. Explain what actions were taken to respond to the challenge and reflect on how well these have worked (or not).

For example: The country has continued to experience fuel shortages in the quarter, which has again impacted on our ability to transport the necessary construction materials to the third drill site, which is more remote than the first two. This has meant the drilling is now one month behind schedule, and onward plans are going to have to be rephased. Given the likelihood of continued fuel shortages, and that the project has 6 more wells to drill before we move to phase two, the team are going to have to review the timelines and approach. The SANCO team will continue to lobby with the department for rural affairs, to secure the MOU which will allow them to access government fuel depots when a level four fuel restriction is in place (which is happening frequently now). This MOU will be a significant achievement for the team, who have been working to get this in place for several months, however it has not yet been signed off by the regional cluster, who have come back with further due diligence queries..... etc. **(Recommend a maximum of 300 words)**

3.2 Update and upload your Risk Register.

Risk management is live and ongoing and requires regular discussion with project teams and review of the risk register. The UK Aid Match project risk register should be updated every quarter (at least). The template is cumulative, with quarterly updates added as layers to existing risks so it is important to use the correct template when updating.

There is detailed guidance in the risk register itself on how to update, under the 'Making Risk Register Updates' section in the Guidance tab. There are also detailed comments for each column header in row 8 of the Project Risk Register tab. Please pay close attention to the following:

- Column S 'What's changed this quarter' must be updated for **every** open risk, each quarter. If there has been no change, please state this explicitly and date the update. New updates should always be at the top in red text, with all previous updates below changed to black text ****this allows for ease of review****
- Column T (Trend) must also be reviewed for **every** open risk, each quarter. Change the status to 'downwards' if the risk has subsided or 'upwards' if something has happened (this should be reflected in the notes in Column S)
- New risks that have emerged in the last quarter must be added, including any challenges described in 3.1 (if these are new)
- Columns U and V only need to be completed when a risk is closed. If a risk is being closed, change the status in Column C
- Risk ratings must be reviewed for all existing risks to ensure an accurate overview of the project risk level.

3.3 Have there been changes to your delivery chain risks?

Yes / No.

3.4 What mitigating actions have been delivered this quarter in line with your Delivery Chain Risk Map (DCRM)? Highlight any emerging delivery chain risks.

If there have been changes this quarter to the DCRM, please explain these here along with the mitigating actions. If there have not been any changes, please give detail on ongoing management of the key risks in the project delivery chain.

Section 4: Learning

4.1 Explain what has been learned this quarter, and how you have or are planning to use this learning.

The project team should be constantly reflecting on and learning about how well the project is performing. This will enable adaptations to the project to ensure it is relevant, effective and on track to meet its goals. In this section, reflect on the following:

- What has been learned during this quarter? This might consider which project approaches are working / not working, for whom, where and why; the impact of changes in the operational context (e.g. policy change, conflict, or natural disaster) on your project plan/approach.
- Where has this learning come from? This might be the monitoring, evaluation, and learning activities; beneficiary feedback mechanisms or context/situation/political economy analyses, or other.
- What has been done or what is being planned with the learning to adapt the project?

Projects should regularly seek feedback from project participants, and reviewing and reflecting on this, on at least a quarterly basis (so this section should not be left empty).

For more on participant feedback, sometimes called community response mechanisms (CRM), beneficiary feedback mechanisms (BFM), etc., see [Guidance on beneficiary feedback mechanisms](#).

Section 5: Safeguarding and Compliance

5.1 Describe anything that has been done to strengthen yours or your implementing partner's approaches to safeguarding in line with FCDO standards.

This section should include updates on anything that has been done in the past quarter to improve yours or your implementing partner's approaches to safeguarding, in line with the FCDO standards covering the following areas:

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

Please review the project's Safeguarding Action Plan and explain the progress made towards activities planned for the reporting quarter. For example, you may have updated your policies and/or procedures, provided training, conducted inductions for new staff etc. This must also include anything you have done with your downstream partners. It's important to give the 'so what' here of these activities or updates rather than listing out the activities.

If you have made any updates to your organisational Safeguarding Policy during the reporting period, please submit this with the report and outline the key changes that have been made.

5.2 What will you do to strengthen your own and your partners' approaches to enhanced safeguarding in the next quarter?

Explain what plans you have for the next quarter to improve your or your implementing partner's approach to enhanced safeguarding in line with the FCDO standards. Please review the project's Safeguarding Action Plan and ensure activities planned for the next quarter (as well as any previously delayed) are built into your project workplan.

5.3 What are the key challenges you face in doing this and how will you overcome them?

Provide comments on whether safeguarding policies and strategies are working or not, whether you are facing any challenges and what these are.

For example: In this reporting period we have continued to strengthen our safeguarding framework in line with our SAP and FCDO standards. Notably, we have now completed the training for the safeguarding champions, and the community have elected two people to cover the Kisumu sites. This has mirrored the successful approach of the Meru sites, where this has

been working for six-months. The champions are members of the community, who are trusted and respected, and are more likely first point disclosure points than the previously appointed field officer. The champions will have regular engagement with the field officers who are then responsible for reporting upwards on any safeguarding concerns. The champions also have the direct lines to the safeguarding lead in Nairobi office, as per the policy and are trained to use this in cases where the field team may be the source of the concern. So far, the Meru site has been fielding complaints through this updated approach and has processed 30% more complaints. All of these have been general programme concerns rather than safeguarding ones, which have been addressed. For example... However, the positive here is that this is an indication that the mechanism itself is effective as one of several tools in place... Etc.

And for 5.2: Our safeguarding manager based in Nairobi attended the safeguarding global training in the UK, and is planning to update the SAP and training plans accordingly next quarter.... And give some details on what is likely to change...**(Recommend a maximum of 300 words)**

****Reporting Safeguarding concerns**:** If you have a safeguarding concern, please report this directly to the following emails. Do not use your quarterly report to report a concern.

- ukaid safeguarding@mansiondaniels.com
- reportingconcerns@fcdo.gov.uk
- See more on how to report on the [safeguarding page of the UK Aid Match website](#)
- [Further guidance is also available.](#)

5.4 Are you International Aid Transparency Initiative (IATI) compliant?

It is compulsory to register and publish financial data on IATI. You have six months from the signing of the AGA to register. Data should then be updated on a quarterly basis.

5.5 Provide a link to your IATI data on D-Portal.

For more information on IATI – see [Guidance for IATI on the UK Aid Match website.](#)

Section 6: Other

6.1 Use this section to report anything else you would like us to know

- Provide any further information you wish to share with us. Please note this is an optional section if relevant.

6.2 Upload any relevant documentation.

This section can be used to upload any other relevant documents (this might be photographs, reports, graphs, supporting data, etc.) Please only upload if relevant / useful to the report review. Ensure documents uploaded are labelled clearly and referenced in the narrative in 7.1

Section 7: Finance

7.1 Describe and explain any variances in the current claim from your forecast.

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

7.2 Describe and explain any change to your next quarter forecast.

Give a brief description of any changes to your forecasting for the **next** quarter. Justify those changes

7.3 Describe and explain any changes to your annual forecast.

If there has been any change to your forecast for the overall financial year, please explain and justify.

7.4 If your financial reviewer has returned your report with points requiring response or clarification, please respond below.

Section 8: Next Quarter

8.1 Complete and upload your workplan for next quarter.

There are two ways this information can be presented and there is a degree of flexibility, as long as the information is clear, and aligns with the section 7 financial information around variances and forecasting.

Annual workplan (Gantt chart): An annual workplan in Excel format is a simple way of communicating this information. This should contain all four quarters (and perhaps the whole project) and show an accurate picture of activities completed to date, and where activities are shifting. This should also align with the section 7 information on variances and forecasting. This option is preferred by the fund manager and should be included with the report.

Word document (quarterly workplan template - optional): On the [UK Aid Match website](#), there is a [Word template](#) which suggests a format for describing in a narrative form, the project's planned / completed activities, and plans for next quarter. This can be useful for detailed explanations of changes to planned activities. However, feedback from grant holders has suggested this format can be overly complex and repetitive. Therefore, this template is optional and not required by the Fund Manager.

If using this Word document, please note that the activity descriptions should align with budget and output numbers / descriptions, to allow for clear cross-reference with the forecast.

Section 9: Feedback to Fund Manager

9.1 Do you have any feedback, suggestions, or requests to the Fund Manager?

Use this section to write any feedback you would like to share with the Fund Manager.

If you have any specific questions relating to quarterly reporting that are not addressed in this guidance document, contact the fund management team – either your Performance and Risk Manager, Fiduciary Risk officer, or our Grants Officer who will be able to assist.

Fourth quarter report - Reduction

From March 2024 onward, the requirement for a full fourth quarter narrative report has been reduced. This is in response to grant holder feedback around reporting levels, and the overlap of the fourth quarterly report and annual report. Grantelope will produce a reduced fourth quarter report template automatically.

This report will ask for the following only:

- Updated workplan
- Updated risk register
- Financial claim
- Section 7.

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