Annual report: FAQ

Questions answered in this document.

When are annual reports submitted?

The annual report should be submitted within one month of the project's 12-month anniversary. For instance, if your project started on the 1 April 2023, you should submit your first annual report by the 1 May 2024, for data related to the 12-month period April-March.

Do we use Grantelope for the annual Report?

Yes. Your Performance and Risk Manager will share the templates you need to complete for the annual report through e-mail. Once all the templates have been completed, they should be uploaded on Grantelope. An annual report will open on Grantelope one month prior to the deadline (for example, opening 1 April for 1 May deadline).

How long will it take for us to get feedback on our annual report?

Your Performance and Risk Manager will aim to get detailed feedback to you within six to eight weeks of receiving your report. However, this will only be possible if you submit all required documents on time and if all parts of the document are submitted as requested.

Do I need to submit an annual report for the final year of the project?

Your final 12 months of activity will be captured in the Project Completion Report and connects to the final milestones/targets in your logframe. If granted a no-cost extension, you may be required to submit an additional annual report, depending on the length of the extension and specifics of your project. Please speak to your PRM if this is relevant.

My project is 20 months long, how many annual reports do I submit?

If your project length does not fall into a three-year cycle, your report schedule may be different, and this should be agreed in advance with your PRM.

Do I still need to submit a quarterly report if I am submitting an annual report in the same quarter?

All grant holders must submit a financial claim/ report in the fourth quarter as per the standard claim deadlines. Reporting requirements have however been reduced, based on grant holder feedback that they are especially high around annual report time.

Grant holders will <u>not</u> be required to complete a technical narrative report in the fourth quarter, but <u>will</u> be required to submit the following (on Grantelope):

1. Standard quarterly financial claim
2. Section 7: narrative explanation of variances against forecast
3. Updated project Risk Register
4. Updated annual project workplan.

How do we assess outputs / outcomes for multi-country projects?

Milestone targets should be disaggregated by country and assessment can be made against this. If the project has significantly overachieved in one country of implementation, whilst underachieved in another country for the same output indicator, a balanced assessment should be given in the narrative report. Multi-country projects are interlinked however, and where one country has underachieved, this will be reflected in overall scores (i.e. an A in Ghana and a B in Sierra Leone would likely lead to a B overall).

What happens if I have no outcome data at the time of the report?

We recognise that outcome results may be slower to realise than outputs, which is a natural curve / trajectory for most projects. The logframe is your tool, however, and the milestones should be phased according to your expectations around this curve / trajectory. All grant holders are expected to analyse and reflect on progress towards project outcomes annually. Responses of ‘N/A’ or ‘no milestone/no achievement’ will <u>not</u> be accepted and will be reflected in the Fund Manager assessment / scoring. Proxy indicators / milestones may be relevant particularly for your first annual report, or where an annual report timeline is not aligned with a key data source (for example, school exam dates). Proxy indicators should be identified ahead of the annual report and agreed / detailed in your logframe (source and Indicator Reference Notes).

What happens if my milestone is multifaceted and not easily quantifiable?

Qualitative milestones and indicators are welcome and can be assessed alongside robust and transparent assessment criteria. Multifaceted milestones should be avoided; however, if assessing a multifaceted indicator, it is important to consider a balanced judgement and provide a robust rationale and evidence of the assessment.

What happens if the output score overall is a B or C?

Following assessment from the Fund Management team, projects scoring B or C will work with their Performance and Risk Manager to develop a Performance Improvement Plan (PIP). PIPs are designed to be a supportive framework to get the project back on track and milestones and actions will be agreed collaboratively. This will be discussed in detail during the debrief meeting.

Do I need to submit financial information?

Grant holders are not required to submit additional financial information for the annual review. You should submit the quarterly financial report as per the claims timetable, even when submitting the annual review. The Annual Financial Review will be compiled by your Fiduciary Risk Officer from June onwards, after the Q1 claims have been processed, and shared with you by the end of the first week in August at the latest.

Do I need to submit annual audited accounts?

Annual audited accounts are not a requirement for the annual review. They should be submitted to your Performance and Risk Manager and Fiduciary Risk Officer no later than six months after the end of your financial year, either via e-mail or you can upload them to your quarterly report on Grantelope. If, however, more than 6 months have elapsed they will be requested as part of your Annual Financial Review feedback.

Do I need to submit my asset register?

Updated asset registers should be submitted as part of the annual review. Please note that only FCDO funded assets need to be listed and ensure both the purchase values and dates exactly reflect reported expenditure.

Where can I go to access further information?

Grant holder guidance and resources can be accessed through the UKAM External Grant Holder Resources folder. This folder allows us to share files that we cannot store on the UK Aid Match website, including learning event reports, presentations and summaries from reference groups, webinars and much more. Grant holders also have access to the Cross Fund External Grant Holder Resources folder on Box. This sharing folder allows us to share files on reporting, the discussion series and much more. For access or any additional support please contact your PRM or e-mail ukaidmatch@manniondaniels.com.