Completing your Annual Review Narrative Report Guidance

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Introduction

All UK Aid Match grant holders are required to submit an annual report for each project implementation year, in line with the terms of the Accountable Grant Arrangement (AGA).

The annual report is an opportunity to reflect on key achievements, challenges and learning from the past year, to assess overall project progress and ensure the project is on track to meet its objectives. The report should be centred on an evidence-based critical reflection of the reporting period, with emphasis on analysis of impact, rather than a description of activities.

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Assessment: Composite Scoring

Grant holders will self-assess against each output and outcome indicator, and overall for those sections. The fund manager will review these self-assessments, considering progress and quality of evidence, and will make a final assessment.

The output and outcome assessment will be combined with two other impact areas (social inclusion and sustainability) to give an overall weighted composite score.

Feedback will be shared alongside final scores, and this will be discussed in an annual report debrief meeting.

Assessment area	Assessment weighting
Progress against Outputs: The immediate changes (conditions) as a result of inputs and activities	50%
Progress against Outcomes: The changes as a result of the new conditions, which might take more time to come to fruition	20%
Social inclusion (gender and disability): How the project is impacting the most vulnerable and marginalised groups, including women, girls, and people with disabilities. (7.5% for disability and 7.5% for gender).	15%
Sustainability: How the project ensures benefits will last beyond the life of the project	15%

Quality Scores

The quality of the report will also be assessed using the below criteria. This assessment does not form part of the overall score.

Quality of evidence is a key aspect of output and outcome assessment however, and this will impact overall scores. Therefore it is important to ensure all evidence / data is accurate and robust. This includes reflection and analysis where there have been issues with data and evidence, and it is important to be transparent and open about this. Grant holders are strongly encouraged to revisit the Quality of Evidence webinar on Box for further guidance.

Criteria	Quality description
Completeness	All sections have been completed. All relevant documents have been updated and included.
Content	The content is useful / relevant. There is a good balance between description and analysis. Good quality, credible data and evidence is provided to prove results.
Clarity	The report is concise, clear, well written and easy to read The length of the responses is proportionate (word limits are followed where relevant).
Relevance	The responses focus on the main issues. The report responds directly to the questions asked.
Responsiveness	The report has addressed comments/ recommendations made in previous feedback / reviews / discussions.
Accuracy	The report guidance has been adhered to. Responses are accurate, and the correct templates have been used. Consistent data is presented throughout the report.
Timeliness	The report is submitted on time.

Completing the annual report – a step by step guide

This guidance is designed to support grant holders to complete the annual report accurately, with robust and credible evidence provided to help explain results. Real examples are provided from grant holder annual reviews as a guide to indicate level of detail and what to focus on.

The rest of this guide covers each section of the narrative report, with examples where relevant.

Word counts: The report template does not have word count limits, however as a guide, 200-300 word responses to most questions would be appropriate. Please write responses as relevant for sufficient detail.

Section 1: Grant Information

This section covers the grant overview and must be completed accurately and in full.

Budget: When completing section 1, include the budget used in the **project year**. This is not always the same as for the financial year (April to March).

Acronyms: Avoid the use of jargon and acronyms and only use them when necessary. If it is necessary, list the acronyms. The report may be difficult to review if this section is not completed fully and may negatively affect the quality score.

Section 2: Beneficiary Reach

2.1 Complete the annual Beneficiary Data Summary (BDS) sheet, and refer to the guidance tab within the excel document for further information on how to complete it. All beneficiary reach data must be disaggregated by sex and disability at a minimum, as well as any other relevant characteristics. Where this is not possible, clear justification must be noted.

Characteristics: Additional characteristics to be used only as relevant to the project, and if used, should be accompanied by trend analysis in the report.

BDS Version: Each project will have a live / cumulative version of the BDS – please ensure you use the approved version shared by your PRM and reach out to your PRM before finalising the report if unsure about the data contained within it.

2.2 An analysis of beneficiary reach is important to understand the extent to which the project has reached its planned targets – both in terms of numbers and characteristics.

Direct and indirect beneficiaries: It is important that it is clear and consistent across all project reporting documents how the project is using these terms and defining its project participants. The guidance tab of the BDS template has explanations for these terms. Please speak to your PRM before finalising the report if unsure.

Section 3: Performance against outcomes

The purpose of section 3 is to evaluate the progress made towards achieving the end of project **outcomes** (results). This is done by assessing the extent to which annual outcome milestones have been achieved.

> Note that evidence of performance against outcomes must be collected and evaluated prior to completing the report. It is not appropriate to use evidence of progress towards outputs as evidence of progress against outcomes. This assumes that the outputs achieve the outcomes, and this is not automatically the case. It is important to test whether the theory of change and underlying assumptions and evidence hold true. All grant holders are expected to provide evidence of progress towards outcomes.

There are **three** outcome spaces in the template (for three outcome indicators). When completing, add or delete as necessary to ensure all outcome indicators in the approved project logframe are reported against.

Logframe Version: Each project will have a live / cumulative version of the logframe – please ensure you use the approved version shared by your PRM and reach out to your PRM before finalising the report if unsure about the version that has been shared.

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Self-scores should be made on the following basis:

On track	Milestone achieved (with up to -10% variance) and supported by credible evidence
Getting there	Between 11-20% under the milestone and supported by credible evidence, OR lacking credible evidence
Off track	More than 20% under the milestone OR no evidence OR evidence lacking credibility

3.1 Indicator information: Enter the indicator description, self-score, milestone (target), and achievement data. Please ensure this is accurate and correlates with the logframe data.

3.2 Disaggregated results: All relevant milestones and achievements should be disaggregated at a minimum by sex and disability. Please ensure disaggregated figures are accurate and correlate with the logframe and BDS data. Please ensure that across all outcomes and outputs, disaggregated data is used to inform **trend analysis**. This should provide insight into the project's performance in relation to those characteristics (whether disability status, sex, or other). Your response should highlight any differences in the levels of change being experienced by different groups and what that might tell you about the barriers to change those groups are facing. For example, the data may indicate that women in rural areas are showing a different rate of change to those in urban areas, or male youths living with a disability are showing higher engagement levels than older participants, or out-of-school boys are attending a club in higher numbers than their female counterparts. Trend analysis should encourage reflection on these data trends, to further explain the project's progress, challenges and crucially, adaptations that might be needed.

3.3 Evidence: Results must be supported by good quality, credible evidence.

Scores will be revised downwards by the fund manager if evidence provided and/or data collection methodologies are considered not good enough to verify results or no evidence is provided.

Reflection: No evidence is perfect and it is almost impossible to eliminate measurement error. In the report, identify and explain the potential sources of error for each indicator and explain how these were mitigated to provide reasonable confidence that the best available evidence was collected in the best way. In this section explain clearly:
- ✓ How the evidence was collected: provide details on the instruments and methods used
- ✓ Who the evidence was collected from: explain the size of the population, if relevant provide descriptions and explanations of sample sizes, the sampling methodology and explanations of potential sampling error

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✓ Data collection processes: Who collected the data, when was it collected, are there potential errors or issues with sample sizes / confidence levels which may impact on data validity and reliability? What was done to mitigate any possible bias in the data?

✓ Data quality and integrity measures taken: describe what was done to ensure that no errors were made in collating and analysing the data

✓ Plans to improve evidence quality next time if needed

✓ Please ensure this correlates with the source information in the logframe, and any supporting indicator reference notes. Where necessary, please update these (using red text to allow for ease of reference).

Example

Improved health is one of the overriding objectives of this project. To track progress against this objective, we conducted a digital survey using volunteer community health workers, who went door to door directly asking the questions and recording the answers. We felt this was the best way, as not all beneficiaries are functionally literate. We aimed to keep questions unambiguous and simple as possible and to ensure they were not leading questions. All 25 community health workers were trained to ask the questions and record answers objectively without influencing responses through a two-day enumerator training workshop and had to pass an exit test to be part of the final survey team. Data was collected from 477 households, representing 2,518 people. These were all people that had benefitted from project activities in year 1. As we had 1500 households in year 1 with 7,400 people this represents approximately 32% of our total project target group. The households were chosen using clustered sampling by zone and then systematically chosen by interviewing every 5th household until the agreed sample quota was met. We had originally planned to collect data from the same sample as used in the baseline to really be able to compare results. Due to restrictions on household visits during the lockdown and time restrictions on collecting data in time for the annual evaluation once lockdown had been lifted, we were unable to do that, and the sample had approximately a 40% variance from the original households. We believe that this is still sufficient to make valid comparisons at this point, however, to supplement, we have planned to collect data from another 179 households later this quarter. The sample works on the margin of error of 5.88%, confidence level 95%. We must be a little cautious with the results. We know that questions related to health are not always fully answered or answered honestly as people may not always want to discuss issues of health with strangers. Further, there were cases where some household members answered on behalf of others, who were not present at the time. This was noted in at least 12% of HHs, where a relative who was not head of the HH answered. Trend analysis on these 12% has been included below.

We worked hard to try and eliminate bias in the data wherever we can. However, it is possible that some bias is still present in the data as it relied on self-assessment and self-report. Sometimes interviewees may have told the community health volunteers what they think they wanted to hear rather than the truth.

3.4 Progress: Consider factors contributing to the results. If there are differences between milestones and actual achievements, it is important to analyse these and reflect on why they have arisen. This is applicable for both over and under achievements. Reflect on strategies that have worked well and those that have not, and explain why. Milestones in the approved logical framework should be cumulative, unless otherwise specified, so make clear whether the milestone is cumulative or unique for the reporting period.

Example

By the end of year one, we expected that 30 of 100 girls would pass the school leaving certificate exam and gain admission to government secondary schools. Within the year,28 girls passed the school leaving certificate exam and gained admission and are due to start secondary school in September 2019. The variance of -2 (-7%) shows an underachievement against this outcome target. This is because one of the girls has passed the exam but is yet to be enrolled into secondary school due to registration delay in the school. We have confidence this will be rectified by October. The second girl was actively participating in our programme but had to leave due to a change in family circumstances. The team worked with the family to prevent this but it was beyond the control of the team / project. The results suggest that the interventions for improving girls' learning outcomes and retention are working. However, for next year, where we have a milestone of 35 additional girls passing exams, we will increase our outreach target from 40 to 45 to increase our likelihood of meeting our target for the reporting period.

3.5 Adapting: Please give detail on the 'so what' of the evidence and progress. What will the project do differently in the following period as a result of the data analysis and learning? Will any changes also be required to workplan/ budget / logframe, etc?

3.6 Scoring outcomes: An overall outcome assessment is required based on the outcome indicator assessments. Reflect on the progress made for each outcome indicator and assess overall progress to achieving the project outcome as on track, getting there or off track. This should be a balanced judgement based on findings reported above.

> **Example**
> The project outcome is for 32 unemployed young disabled people to have secured and sustained formal or self-employment for at least 12 months, and the outcome indicators measure:
> (1) the number of people entering employment,
> (2) the number of employers who sign up to a disability awareness employment scheme and (3) changes to the government labour policies to support inclusion of people with disabilities.
> As our results show, during the reporting year (1) the number of people entering employment significantly exceeded targets (on track), (2) the number of employers signing up to the scheme only marginally missed the target (getting there) and (3) the government's engagement was significantly off track due to changes in personnel. The overall outcome can therefore <u>only</u> be assessed as getting there with one outcome milestone achieved. We will aim to get back on track against outcomes during the next year by increasing government engagement during the second and third years through demonstrating the successful impact of increasing the number of people with disabilities in employment and successfully engaging employers.

Note: If you are off track against any one outcome indicator you cannot be assessed as on track overall.

Section 4: Performance against outputs

The purpose of **section 4** is to evaluate the progress made towards achieving the project **outputs** during the reporting period. This is done by assessing the extent to which annual output milestones have been achieved.

There are **three** spaces for output reporting in the template (each with space for three output indicators). When completing, add or delete as necessary to ensure all outputs and output indicators in the approved project logframe are reported against.

Indicator information: Enter the indicator description, milestone and achievement data. Please ensure this is accurate and correlates with the logframe data, checking for any data discrepancies before submission as this will impact your quality of report assessment.

Self-assessed score: For each indicator, provide a self-assessed score using the below guidance.

Score	Standard	Additional Considerations
A++	If you have exceeded your annual milestone by more than 20%	Supported by credible evidence
A+	If you have exceeded your annual milestone by 11-20%	
A	If you have achieved your annual milestones by plus or minus 10%	
B	If you have not met your expectations by 11-20%	No evidence OR evidence lacking credibility
C	If you have not met your expectations by more than 20%	

Disaggregated results: Please follow the guidance for outcomes above, ensuring that the same level of trend analysis and reflection is conducted at output level.

Evidence, progress, adaptation: Answer the next set of questions using the same guidance that was provided in the outcome section and repeat the process for each indicator under output one. Repeat for each output.

Overall output performance: Once complete for all indicators within output one, assess overall performance against the output. This should be a balanced judgement based on findings across each indicator. Repeat for each output.

Example	A
Output one looks to improve practical skills to reinforce maternal and child health practices. There are two indicators, measuring the number of breastfeeding mothers consuming additional meals; and number of children with diarrhoea instances in the last two weeks and both are equally important to the overall output. We have self-scored these as A+ and B, and overall have scored the output as an A.	

Output scoring table: Section 4 should be completed alongside the Output Scoring Table (separate Excel template) shared by your PRM.

- ✓ Reach out to your PRM before finalising the report if any of the pre-populated information is missing or incorrect.
- ✓ Once the overall performance for each output has been scored, input this data into the Output Scoring Table.
- ✓ Refer to the guidance tab within the excel document for further information.

'A' score is the goal: At output level, strong performing projects are usually those that score A. Scores above or below may be indicative of poor planning and management, where milestones were either not ambitious enough or were too ambitious, and not connected to baseline data. Scores may also reflect unforeseen events or circumstances, and it is important to explain this

in the narrative report, so that it can be considered in the review. Where overachievement is the result of project success / effort, targets for future years will be a point to discuss for the period ahead.

Section 5: Approach

The purpose of this section is to reflect on and evaluate the technical approach. Interventions, activities and targeting strategies used to deliver the results, with a view to understanding what has worked and what has not.

5.1 Workplan: Reflect on progress against the project's annual forecast and workplan over the reporting period. Have there been significant changes, what is the impact and what will need to change for the year ahead? Make reference to your annual workplan (updated quarterly with quarterly report)

5.2 Theory of change: Reflect on the development hypothesis and theory of change (TOC) that underpins the project. It is important to remember that the TOC sets out the 'best guess' about the most likely path to change and is based on understanding the problem and its context at that time. The TOC is likely to develop over time as relationships are built, new information gathered, methodologies trialled, and there is space for reflection on what is working and what is not.

Using the results presented as evidence, reflect on whether the theory of change is holding true. Consider the links between the results in each chain (causal pathways between activities, outputs, and outcomes) and how consistent they are. To what extent is the initial logic correct, and have assumptions been proven/disproven?

- ✓ For example, if around half of the workplan has been implemented, and scoring suggests a 'B' at output level, and 'on track' at outcome level, this suggests that there is some disconnect in the theory of change logic (i.e you can get to the outcome without the output, or at a different pace / or with less or different resources / input).
- ✓ Alternatively, if most of the workplan has been implemented and output level achieved an A, but the outcome is off track, there may be something missing in the original understanding of how the outputs would lead to the outcomes, and new approaches may need to be considered.
- ✓ If most of the workplan has been implemented, output level achieved an A and the outcome is on track, this indicates that the theory of change remains sound.

Inconsistent patterns indicate that some assumptions are not holding true and causal links in the chain are threatened, either entirely or partly, and reflected in the underperformance in some elements of the outputs or outcomes. **In this section acknowledge where this is happening and conduct a risk analysis to understand the possible dangers and how to address**

these. **These should then be included in the risk register**. Based on analysis, the theory of change may require adjustment for the next year. To support this analysis and reflection, consider the following questions:

	Since last working with your Theory of change
Problem	What more have you learned about the nature or extent of the problem you are addressing?
Context	Consider what changes have taken place in the operating context during the reporting period and reflect on whether the theory of change remains valid. For instance, consider whether any political, economic, social, and institutional factors have changed
Key actors	Who are the key actors now, and how have their relationships, interests, and/or incentives changed?
Interventions	Given the changes in the context or your understanding of the problem, do you need to change approaches? Is there new information or recent changes in key dynamics that impact the sequencing of strategies?
Outputs	Given the changes to the context or to the strategies, are any changes to the outputs (pre-conditions for achieving the outcome) needed.

If proposing changes to the theory of change, please submit a revised version with the annual report. You can access guidance on theories of change on the UK Aid Match website.

Social Inclusion

The purpose of this section is to evaluate the extent to which project strategies to include and benefit people vulnerable to exclusion have worked and whether any changes are needed to strengthen them in moving forward. There are three sections to complete, each looking at specific vulnerable groups.

5.3 Overall targeting approach: This UK Aid Match project will be benefitting a specific marginalised or vulnerable group of people in a developing country context. This may be people living in extreme poverty, orphans and vulnerable children, marginalised ethnic groups, or remote, disadvantaged communities and will vary from project to project. Characteristics should be evident from the Beneficiary Data Summary.

5.4 Gender equality: As a condition of the Accountable Grant Arrangement (AGA), <u>all</u> projects should be working towards promoting gender equality. All projects have outlined an approach to promoting gender equality, with a set of key actions and goals for each year of the project, as part of the grant set-up and annual review processes. Grant holders should refer to their action plans, providing an update on progress towards the actions and goals set for the reporting period, providing practical examples and making specific reference to each of the four dimensions used in the UK Aid Match Gender Equality Responsiveness Tool.

5.5 Disability inclusion: As a condition of the Accountable Grant Arrangement (AGA), <u>all</u> projects should be working towards ensuring inclusion of people with disabilities. All projects have outlined an approach to promoting disability inclusion, with a set of key actions and goals for each year of the project, as part of the grant set-up and annual review processes. Grant holders should refer to their action plans, providing an update on progress towards the actions and goals set for the reporting period, providing practical examples and making specific reference to each of the four dimensions used in the <u>UK Aid Match Disability Inclusion Responsiveness Tool.</u>

In each section explain the specific strategies used to ensure vulnerable people were able to participate in and benefit from the project. It is important to consider:

- ✓ How the project has designed its activities and approaches to ensure they are at the least accessible to marginalised groups, or how activities have been designed around the specific needs of these groups. Please note that access does not only refer to physical access for individuals with mobility challenges; it is important to consider all forms of marginalisation (Project Design & Implementation).
- ✓ To what extent the project is contributing to challenging the wider discriminatory social norms or stigma that these marginalised and vulnerable groups may face (Project Design & Implementation).
- ✓ How the project has consulted the most marginalised and vulnerable groups to ensure their needs are understood and their ongoing views on the project are incorporated into project design, implementation and review (Participation & Voice).
- ✓ How the project has identified who is most marginalised and vulnerable, and how it tracks that these groups are reached by the project and that they are benefiting from the project interventions (Results Measurement).
- ✓ How the project has utilised its data or consultations with marginalised groups to adapt activities or interventions to ensure they respond to the needs of vulnerable and marginalised populations and are benefitting those groups (Learning & Adaptation).

Use data and specifically the disaggregated data from sections 2, 3 and 4 to indicate whether the strategies were successful or not.

- ✓ If milestones were met it would suggest the strategies are working.
- ✓ If milestones were not met some improvements will need to be made.
- ✓ If there is no data, this is clearly an area that needs to be addressed in moving forward.

> **Example**
>
> Project design and implementation: As per our GESI action plan, we consistently applied reasonable adjustments to our project implementation strategies. For example, to ensure that people with disabilities were able to participate in our community discussion activities, we hired a venue that was on the ground floor and therefore, accessible for people with mobility issues. We also ensured that all the meeting materials were in large print for any person with visual impairments.
>
> Participation and voice/results measurement: Despite these efforts, few people with disabilities attended the meeting, less than 1%, and none of those actively participated in terms of expressing their opinions. In reflecting and evaluating on the success of this activity, we realised that we did not do enough prior to the meeting to address any of the attitudinal barriers that exist in the community and families that hamper participation of people with disabilities.
>
> Learning and adaptation: To strengthen our approach, we are now working closely with a local organisation of people with disabilities (OPD) to better understand local attitudes towards people with disabilities and the best way to proceed in changing attitudes.

Composite scoring: The fund manager will conduct a gender equality and disability inclusion assessment based on the information provided in this section. Detailed feedback on this will be given, and a 15% weighting will be added to your overall score.

While it is not realistic for all grant holders to be gender or disability transformative (indeed we would only expect a few projects with gender equality or disability inclusion as their primary focus to be assessed as being at this level), all grant holders should be addressing GESI as far as possible within the existing scope for their project, and holding themselves accountable to GESI plans.

For more general information on gender equality and disability inclusion, see the external Box folder here. Please email your PRM and Grants Officer for any access issues.

Section 6: Monitoring, Evaluation and Learning

The purpose of this section is to reflect on and evaluate the extent to which the monitoring, evaluation and learning system has generated credible information and how well it was used for performance management (project improvement, adaptation, innovation, and accountability) in the past year.

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Learning and adapting

The fund manager supports adaptive programming and understands that plans change in the light of challenges faced, new learning generated and changes in the operating context.

Use the Monitoring, Evaluation and Learning sections to describe any adaptations made to the project based on information revealed through monitoring, evaluation and/or learning processes that has not been described in previous sections. This could be changes to the:
- Nature of the activities or approaches,
- Timing of the activities,
- Number and type of people involved.

Explain why the changes were made. What were the changes in the country context or the political economy that prompted shifts in programming (e.g. policy change, security issues, national emergencies)? Use any data that you have to explain how successful (or not) the adaptations were.

Example

The project originally aimed to work with the local community to set up a waste management hub as a social enterprise. However, changes to the political economy during the first year (a change in regional leadership structure and budgeting that was not foreseen) and the establishment of a local government waste management department meant that the project was no longer able to carry out the original plan and the business model had to change. Instead, the project adapted to a public private partnership model with the local government waste management board. To date, the partnership has been very successful with the local government providing land for the hub and waste transportation vehicles for free. As a result, the project is likely to be much more sustainable.

6.1 Logical framework

The logical framework is linked to the theory of change. The theory of change illustrates what changes are expected at the different stages of the project, whilst the logical framework shows how these changes will be measured and what the expected results are. Take this opportunity to reflect on the logical framework and consider appropriate amendments for the subsequent year.

To do that, consider the following questions:
- ✓ Is there a clear link between the logical framework and theory of change? Does the logical framework measure all changes indicated in the theory of change? If amendments to the theory of change are proposed, have these amendments been reflected in the logical framework?
- ✓ Are output and outcome statements and indicators results-orientated? They should not reflect inputs or activities, but what changes will be experienced as a result of inputs and activities.

✓ Do indicators reflect the results that you are trying to achieve? Do they capture the right elements that represent the important changes that you are seeing in the project?
✓ Are indicators adequate, i.e. do they measure all elements of the results statements?
✓ Are milestones for the next year and end of the project realistic and achievable considering the results presented in this report?

[Find out more about logical frameworks, including a quality assurance checklist for assessing your logical framework](.).

✓ In this report, proposed changes to the logical framework can be made for the next year. Write all proposed changes into the change log in the logical framework template and submit with the annual review.
✓ These must be discussed and agreed with your PRM following a review of the report, before being implemented.
✓ In accordance with the principles of adaptive programming, changes to the outcome statements and indicatorsshould be avoided – as these should accurately reflect the goal of the project, and this goal should remain unchanged.
✓ However, the output statements, indicators and milestones can be reviewed and amended, if necessary, as these reflect how you plan to achieve the outcome.

6.2 Achievements

The focus of this section should be on looking at the specific strategies, interventions and activities used during implementation which led to the results presented in previous sections. It should not just be limited to the technical interventions but also consider the operational processes and procedures involving delivery of outputs, such as budget forecasts, working with downstream partners, project team or other stakeholders. Consider:

• Whether activities had the intended outcomes and reflect on any unintended outcomes.
• Whether you have gained any further insights into the realities, pressures and experiences of project beneficiaries that affect how they engage with the project or experience its benefits.
• Operational processes and procedures involved in the delivery of activities and how these might have affected results.
• Working with downstream partners, project team or other stakeholders and how these relationships helped or hindered progress towards the project outputs and outcomes. Make sure to explain how you responded to the learning.

6.3 Challenges

What were the challenges and how were they managed? In the context of this report, a challenge is defined as something that has already happened, a risk that materialised, and has impacted or is currently impacting the project objectives. Report on whether these challenges were anticipated, the impact on the project, how they were dealt with and how they will be

addressed in the coming year if they occur again. Challenges might come under different categories including:

- Contextual
- Project delivery
- Safeguarding
- Operational
- Fiduciary

The next four questions require reflection on different types of learning activity in the reporting period. Learning is not valuable unless used, so make sure to explain:

- What was learned and how,
- How you responded to the learning – that is what you did or what you plan to do.

6.4 Collaborative Learning Plan (CLP)

Please submit the latest version of your CLP. **Note**: CLP changes do not need formal approval by your PRM, and the evidence collected towards answering the questions will be reviewed through the learning section of the report and during the annual review debrief with your PRM.

6.5 The Collaborative Learning Plan (CLP) is intended to ensure that learning is systematic, intentional and resources are dedicated to it. For full guidance on Collaborative Learning Plans, see the external Box folder here.

In the learning section of the report, reflect on:

- Whether the questions are still relevant and useful,
- What you can answer about the questions currently,
- Any challenges you have experienced in the quality of evidence you have collected to answer these,
- How well the theory of change reflects the learnings you have gathered through the logframe and CLP.

6.6 Learning from research and evaluations (if applicable)

This section focuses on the more structured and formal learning activity that may have been carried out during the year, which can include any of the following:

- Baseline surveys (applicable for year one reports)
- Annual evaluations
- Responsive evaluations and research conducted as a reaction to learning generated through monitoring and evaluation.
- Planned research or learning activities. Explain the headline findings from the research and outline what actions were taken, or will be taken, to improve or adapt the project.

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> **Example**:
> We conducted additional research on why there was an average of 70% improvement in school attendance of girls, but this was not being manifested in improved learning outcomes. The research found that although these girls were active in class, they often failed simple tests and homework. A major reason given for this was the difficulty in finding time to study after school when the girls returned home. As a result, we are in discussions with the school authorities to have set up optional study periods for two hours after school. We will have one of our facilitators available to help the girls with homework as required. We are hoping this extra assistance will result in more opportunities to improve learning thus enabling the project to reach its goal.

6.7 Learning from beneficiaries

Consistent interaction with, and feedback from, beneficiaries is an important part of the project to assure relevance and accountability to the beneficiaries. A full beneficiary feedback mechanism should involve systematic collection of feedback (including from identified marginalised groups), analysis of this feedback, clear responses to the issues raised, communication back to the beneficiaries of what action is being taken to 'close the feedback loop', and whether the actions taken meet their needs.

In this section:
- Describe the mechanisms/tools used to collect feedback from beneficiaries in the past year.
- Give specific examples of the feedback received.
- Explain how that feedback has been analysed and used.
- Explain how beneficiaries were informed that their feedback had been used.

> **Example**
> One of the most frequent comments written anonymously in the suggestion box stationed outside our office was a preference for female social workers rather than men during the needs assessment sessions with female beneficiaries. Although we took this comment on board, it was difficult to implement as female social workers were scarcer. As a result, we added the question about preference of the social worker gender at the first engagement with both male and female beneficiaries. Thus, prioritising the girls who specified female and giving them female social workers, while those who did not specify anything worked with a male social worker. We let all our beneficiaries know that we were addressing this feedback and how through the project quarterly newsletter, which was distributed in August.

Section 7: Sustainability

Sustainability is about how a project will achieve impacts that will continue beyond funding from the FCDO (either for project participants, or for sustained service improvements or approaches developed by the project). Sustainability should underpin the project design and be reflected upon regularly through the project cycle. This section of the narrative report is an opportunity to reflect on and assess three key areas:

7.1 The sustainability plan

Use this section to explain the project's sustainability plan. Clearly outline the local and institutional stakeholders to whom ownership and responsibility for project activities and ongoing benefits will be transferred over time. Explain the strategies the project is using to ensure this transfer. Please ensure the plan is clear for each output / component of the project.

7.2 Effectiveness of the sustainability plan

In this section, provide evidence that the sustainability strategies outlined in the previous section are working and reflect on whether the evidence suggests that benefits will be seen beyond the life of the project. If not, consider whether adaptation to the sustainability strategies is needed. Evidence can be gathered through a range of sources including logframe results, project monitoring reports, qualitative data collection etc. Please revisit the Evidencing Sustainability webinar for further support in this area.

7.3 Risks to sustainability

Use this section to outline the key risks that relate specifically to the success of the sustainability plan/strategies. It is helpful to consider who the key stakeholders are and the influences that might affect their ability to assume responsibility for the continuation of activities/benefits once the project ends. For each risk identified, explain the mitigating action and, where possible, provide evidence that it is being managed effectively. Make sure the project Risk Register is updated to include these risks to sustainability.

Composite scoring: The fund manager will conduct a sustainability assessment based on the information provided in this section. Detailed feedback on this will be given, and a 15% weighting will be added to the overall score.

Section 8: Value for Money

This is a very important section of the annual review and needs to be completed carefully. A value for money analysis is when you compare the results of the project against the costs and answer the question ''were the results achieved worth the costs incurred?''

8.1 Value for Money (VfM) analysis

Please provide evidence of value for money and examples of your approach to value for money.

- Value is evidenced by information of the actual results achieved by the project during the year, considering the scale, depth, and quality of those results. Value can be subjective. However, the value your project intends to deliver has been agreed and is represented in the milestones and targets in your logical framework and other agreed results (for example beneficiary reach). Evidence of results can be found throughout your annual review and in your logical framework.

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- Money is evidenced by information of the costs incurred by the project during the year. Evidence of costs can be found through your budget and accounts. Some financial analysis is needed to complete the value for money analysis. The following are some suggestions for what evidence you could use:

Value (results)
Overall direct beneficiaries reached against annual milestones (Beneficiary Data Summary)
Disaggregated beneficiary reach data (sex, people with a disability, most vulnerable, location) against annual milestones (Beneficiary Data Summary and logical framework)
Progress against plan - overall percentage completed (annual work plan)
Output results achieved against milestones (logical framework)
Outcome results achieved against milestones (logical framework)
Success of sustainability strategies for longer-term impact (effectiveness of sustainability plan)
Social inclusion results (progress towards GESI actions/goals)
How well you managed challenges and risks
How well you used your learning

Money (cost)
Spending benchmarks e.g. how the amount you spent relates to others doing similar things (are you spending reasonably?)
Unit costs at different levels can provide very compelling evidence, especially if you can provide some benchmarks. Unit costs for activities can provide evidence of economy. E.g. unit costs per day of training.
Evidence of savings or efficient use of funding through budgeting processes and careful allocation of resources (are you spending well?)
Estimated costs of additionality gained
Annual actual expenditure against forecast
The ratio of annual spend across the five budget subheadings e.g. capital expenditure versus project activities
Evidence of correct targeting of sufficient resources for the most important outputs in achieving the outcome of the project (are you spending wisely to support the results chain?)

Your response may include a simple **cost-benefit analysis** to provide evidence of efficiency. This means looking at the total amount spent during the year versus the total beneficiaries reached.

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> **Example of cost-benefit analysis**
> We trained 22 teachers during the year and spent £28,248 on the training, which is £1,284 per beneficiary. This compares to £ 2,800 spent by the National Government on training one teacher per year and therefore represents a more efficient spend and value for money.

Your response should also include a simple **cost-effectiveness** analysis. This involves looking at the total number of beneficiaries reached versus the number who have made the desired change, as demonstrated in your logical framework results, and how much this cost.

> **Example cost-effectiveness analysis**
> We trained 22 teachers during the year for a total cost of £28,248. Of those 22 teachers, only 12 reached the standard necessary and were implementing the new methods in the classroom. This means that the cost effectiveness of the training was £ 2,354 per person. This compares favourably to the Government system however, which has a cost effectiveness calculation of £2,500.

Try to provide benchmarks wherever possible to demonstrate the value for money provided by the project. In your analysis you also need to provide concrete examples of how you achieved the value for money that you have evidenced. These examples should demonstrate the consideration of cost and value and how it was compared with other options at each step to select the best. You need to make sure that you explain and justify any decisions made. More information on approaches to value for money can be found on the [UK Aid Match website](#). The following example is comprehensive and provides some ideas of what could be included:

> **Example**
> The total project budget is £1,121,050, all of which is funded by the FCDO. Of the annual projected budget of £434,762 for year 1 we spent £352,220 – which means we spent 81% of our budget to implement 96% of our work plan and in doing so reached 105% of our direct beneficiary target whilst achieving our milestones at both output (score A) and outcome level (on track).
>
> In spending 19% less than expected we were careful in managing our resources. Our efforts at economy included applying good practice in procurement (3 quotes) and only procuring items that were necessary. For example, we initially budgeted to procure 2 containers of textbooks, but having discovered that another CSO had recently provided textbooks to some of our partner schools we only procured one. We also procured the textbooks directly from the publishers rather than a bookshop and purchased them with a 30% discount.
>
> Using 81% of the annual budget to implement 96% of our activities suggests we also used our resources more efficiently than we expected. This was despite the much higher than expected unit costs of the training of trainers' programme (under output 3) which was 26% higher than we expected. The higher costs were largely a result of an increase in the costs

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of international travel and accommodation following COVID-19. These costs were deemed necessary due to the specific content and expertise the consultants brought to the training. While the costs for this output were higher than planned, we do feel that this spend was proportional to need as output 3 is weighted at 50% and is, therefore, pivotal to achieving the project outcome. We feel that if we had not spent this amount we would have achieved much less.

The additional costs incurred could also be justified by the quality and effectiveness of the training, demonstrated by the fact that 28 out of the 30 trainers achieved the standards required and passed the test and have gone on to successfully rolling out the training in their schools. This is a cost effectiveness of £1,200 per trainer which compares very favourably to the Government programme of £2,000. We have now modified the budget to ensure that additional resources are allocated to activities to achieve output 3 based on this learning. Our overspend on output 3 was balanced out as we significantly underspent against our other two outputs. Output 1 by 63% and output 2 by 43%. To achieve this level of efficiency under Output 2 we were able to work with another CSO (the same CSO that distributed books) who agreed to advertise our program on their weekly radio program which greatly increased the awareness of the project within the community and resulted in an increase in the number of parents attending the outreach camps. For Output 1 we were able to leverage support from the local community which provided the venue free of charge. Not needing to hire the venue saved us £2000 according to their prices on their website. Although we underspent on both outputs, it did not affect quality or effectiveness as we were able to achieve our expected milestones (scoring A).

More than half of our annual spend (52%) was on project activities whereas the other half comprised staff (30%), admin (15%), and MEL (3%). This ratio of spend on project activities is very positive and what we were aiming for. Whilst the individual cost per beneficiary remains high at £150 this is to be expected considering the individual learning action plans that are needed for each child and young adult. We cannot compare costs of this intervention directly with a government led intervention as the government doesn't provide a like for like service however the cost per beneficiary is similar to the other project we have implemented in country. It is also important to remember that these beneficiaries are some of the most marginalised people in society and that locating and supporting them, and their carers incurs much higher costs as a result. We were able to reach 105% of our beneficiary target, we did so by hitting our female target of 200 which also included girls married before they were 18 and young mothers. We were able to exceed our target of males involved with the project by changing the training schedule; we condensed the training session into a weekend and combined it with a sporting activity. This change saw an 80% increase in male engagement with the project. Whilst we have reached xx of people with disability this only makes up 5% of the beneficiary total and this doesn't compare well when compared with the % of PWD living in the community. As such in the following year we will work closely with our disability downstream partner to increase our engagement with PWD. In summary we feel that this project has been economical, efficient, and effective with resources during the year. This has allowed us to reach some of the most marginalised in society thus contributing

> to FCDO leave no one behind agenda and at the same has generated some very positive results overall. As such we consider that the project has provided good value for money to the UK taxpayer.

Section 9: Other

Use this section to provide any further information or upload any other documents that have not been covered elsewhere in the report. For instance, write about any of the following where relevant:

- Any changes to enhanced safeguarding approach not shared through the quarterly report process (for example updated safeguarding policy).
- Stakeholder coordination. For example, meetings, round tables, steering committees, and stock takes not included in outputs.
- Advocacy or lobbying activities not included in outputs.
- Wider engagement that the project has undertaken; for example, with other CSOs or programmes in the region.
- Unexpected activities or benefits outside the project plan not mentioned in the value for money section.
- Coordination or knowledge sharing with other UK Aid Match projects or others.
- Capacity building for project staff and/or downstream partners.
- Visits to the project by the fund manager or others, including remote monitoring visits.

Section 10: Feedback to the fund manager

Use this space to provide feedback, suggestions, or requests to the fund management team.

Process

- ✓ Annual report guidance available on the UK Aid Match website
- ✓ Project PRM will share project specific templates with grant holders
- ✓ Project PRM is available for a pre-annual report support call if requested
- ✓ Feedback shared and annual report debrief meeting conducted to discuss findings from the review, and agree timelines for any actions
- ✓ Actions to be followed up in writing along with any changes to key documents, such as logframe and GESI action plan

During the annual report debrief meeting, proposed changes, like revisions to your logframe, will be discussed based on learnings and report findings. It is important to note that the annual report should reflect and report on progress to date, and whilst potential adaptations are welcome (in the narrative report), the performance management team must have a thorough understanding of the rationale for these changes to discuss during the debrief meeting.

Annual report submission
- ✓ Annual reports are submitted through Grantelope.
- ✓ Annual reports will open for submission one month prior to the submission deadline
- ✓ Complete the report on the word template and upload to Grantelope, along with supporting documents

The annual report is due one month after the 12 month anniversary of the project start date. If a project is active for more than 5 months before the PCR is due, an annual report will be required for this partial year. Speak to your PRM if unsure.

File naming convention
All files should be named and shared following the below convention:
Name of document_grant holder name (or abbreviated name)_grant reference_MM.YYYY

Example: Logframe Y2_MannionDaniels_401_05.2024

Please do not PDF any submitted documents and ensure that submitted files remain in the same format as originally shared.

Annual Review Checklist
Below is a full list of all documentation required for submission (this can also be found as a checklist in section 12 in the annual narrative report). Please conduct a thorough review of all documentation prior to submission to support an efficient and timely review process. Following submission, the performance management team will conduct an initial review of submitted documentation. If there are any missing documents, this must be rectified and will be noted in the review.

Mandatory
Completed Annual Narrative Report
Completed Output Scoring Table
Completed Beneficiary Data Summary
Logframe with achievements and change tab completed
Collaborative Learning Plan
Updated asset register
Optional
Theory of Change (if it has been updated)
Research and evaluations (if applicable)
Safeguarding policy (if updated during the reporting period)
Communications products e.g. case studies
Other (please specify)