
Guidance on Reporting under the DGIS funded Partners for Wise Use of Wetlands, 2002-2003 Programme

Introduction

The Grant Agreement specifies that technical and financial reports must be provided to Wetlands International. If a Mid-Term report is specified, this is a relatively simple technical progress report, to provide a clear statement of the outputs achieved and the inputs (funds) used. The primary requirement is for a finance report, using a spreadsheet template provided (see below), and a short technical report to link the financial statement with the activities reported.

The Final Report is more substantial, and will consist of an updated finance report, using the spreadsheet templates provided, and also a succinct technical report that clearly reports the achievements and products of the project. The deadline for such final reports is normally one month after the end of the grant period. The Final Report should report on the whole grant period up to the end of the activities. It is of course permissible to use the content of the Mid-Term report, if applicable, to help the completion of the Final Report.

Mid-Term Reports

A Mid-Term Report (if called for under the Grant Agreement) is primarily a control mechanism to ensure that the agreed project activities are on track and that expenditure is being correctly recorded. The main component of the Mid-Term Report is the Finance Report, which uses the spreadsheet template supplied, and has sections for this report and also for the Final Report. Full guidance on using the template and preparing a finance report is given in the document "Financial reporting.doc".

For the technical section of the Mid-Term Report, only a brief progress report is required that clearly links the expenditure made to the outputs / results achieved, and comments upon successes and failures. On acceptance by Wetlands International, the Mid-Term Report triggers the next grant payment as stated in the Grant Agreement.

Final Reports

There are two sections (Finance and Technical) of the Final Report to be submitted to us, and we prefer one document with the two sections included. In practice this means that a Final Report is expected with narrative sections for Finance and Technical parts, accompanied by a completed spreadsheet file.

The following elements are therefore required in Final Reports

Final Report structure:

Agreement number

Project title

Reporting period

Author and contact details

Finance Report (see more details below)

Technical Report (see more details below)

Annexes (documents / information based outputs from the project)

Financial Reporting

This report or section should contain a clear narrative report linking income and expenditure to actual activities, and include a completed spreadsheet (supplied) to report actual income and expenditure. If the project has also received income from another source, please include it, and explain its relationship to the activities reported.

Wetlands International makes available a finance report spreadsheet for completion - please use the "final" tab on the Excel spreadsheet file: "0emptyfinreport.xls". To assist with its completion there is a useful completed example spreadsheet "0examplefinreport.xls". Please forward a completed electronic copy of the spreadsheet to Wetlands International in addition to any hard copies that may be provided.

Wetlands International also draws attention to the need to provide an overview listing all (numbered) individual expenses and income per budget line and a separate list of all purchased assets and their destination.

Full guidance on how to use the spreadsheet and on financial reporting is provided in the document "0Financial reporting.doc".

Technical Reporting

Wetlands International would particularly like to see in the Technical Report how the expenditure in the finance report relates to activities conducted, with a clear and transparent relationship between activities carried out and the expenditure associated with them. This narrative statement is also particularly important in connection with the self-evaluation by the Agreement Holder of the technical sections of the Final Report, and we shall use this Report in our own evaluation of the activities that were agreed. Wetlands International is in turn also evaluated by the Ministry of Foreign Affairs – DGIS to assess how the overall Programme delivered against expectations. To enable this to be achieved smoothly, we use a simple evaluation framework, based upon our original checklist for project approval, which considered the overall strategy and implementation proposals. Please therefore when completing technical reports include the following:

Objectives and Results: In summary, state whether the activities have or have not achieved the results identified.

Activities and outputs: against each identified activity, show what was planned and what has been achieved, particularly concentrating on measurable results and products that have been developed. Include specific reference to:

- needs that have been fulfilled
- capacity that has been enhanced
- other measurable results
- sustainability of achievements

Successes and failures: It is just as important when reporting on successes, to state whether there were failures and what has been learnt from the problems encountered, and to suggest how such problems could be overcome in future.

Annexes

Outputs / products in the form of reports and other documents, posters, CDs, database files, etc, should be included in two copies each. If certain outputs are very bulky or only part of the outputs are considered to be relevant to include, please contact Wetlands International first to obtain guidance. Attention is drawn to Article 10 of the Grant Agreement concerning acknowledgements to be included in each output or product.

Further information: Download report spreadsheets and guidance at <http://www.wetlands.org/projects/PWUW/reports.htm>