Gavi CSO funding mechanism

Technical Guidance

CSO Reporting

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Introduction

The Gavi CSO funding mechanism requires all grantees to complete and submit project reports at quarterly and six-monthly intervals, and at the end of their projects. These reports are stipulated in all grant agreements between Gavi and grantees and will be used to appraise project progress at key milestones.

This technical guidance document provides high-level information to ensure grantees are familiar with their project's technical reporting requirements. It includes the types of reports they are expected to submit, how these reports will be used, report assessment criteria, reporting frequencies, and how to prepare and submit project reports.

For any further information on grantee reporting requirements, please contact your Grants Manager.

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What kinds of reports will I submit?

Grantees are expected to prepare and submit three kinds of technical reports: quarterly, six-monthly and final. The reports are designed to help grantees, and the Gavi CSO fund management team reflect on project progress, challenges and next steps in a simple way that reflects the different milestones in the project. The reports have been designed to be proportionate.

The type of reports that grantees should submit and the timeline for these are as follows:
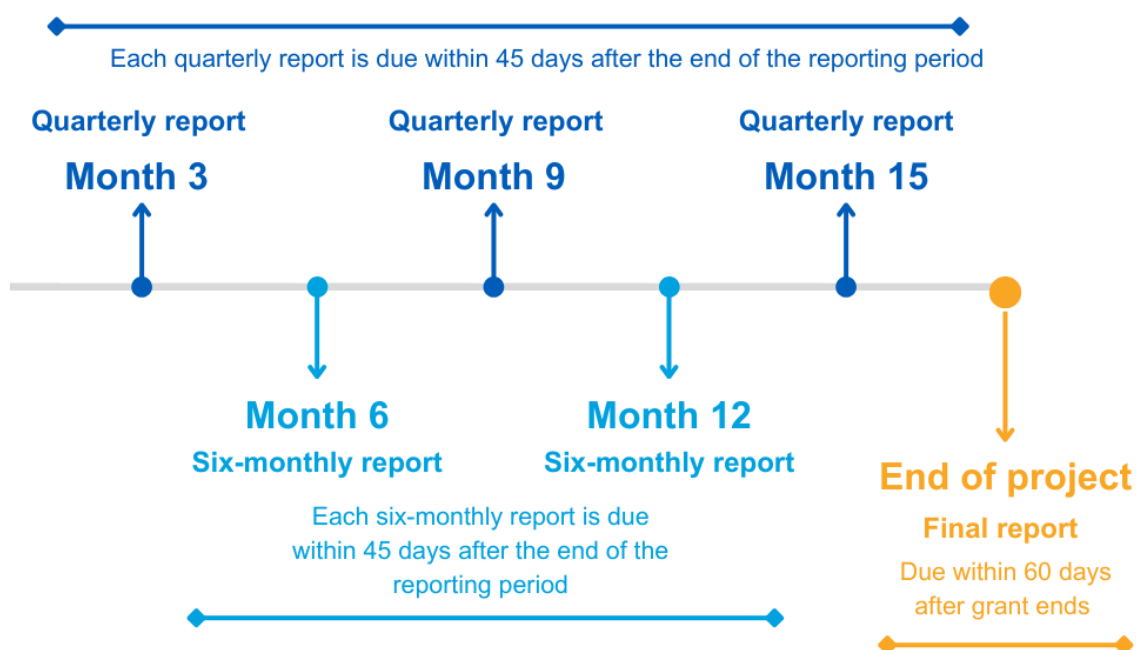
Figure 1 Gavi CSO funding mechanism indicative reporting timeline

If CSO projects end within three months of the usual final six-monthly reporting period, grantees are not required to submit a final six-monthly report. Instead, grantees should incorporate results and progress information into the final report, alongside all results and progress information from across the life of the project.

These reporting requirements will be reflected in grant agreements. In the first instance, grantees should familiarise themselves with the reporting periods in their grant agreements. If there are any further questions, grantees should consult their Grants Manager.

The reports require slightly different information, as outlined below:

Type of Report	Information required
Quarterly report	Basic grant information
	Project progress, including:

	- Workplan updates - Gender equality and social inclusion (GESI) Project risks and issues Project finance Feedback for Gavi and the CSO fund mechanism
Six-monthly report	Basic grant information Vaccination reach, including your Reach Sheet if needed Performance against outputs Approach, including: - Project progress - Workplan updates - Stakeholder engagement - Gender equality and social inclusion (GESI) Monitoring, Evaluation and Learning, including: - Results framework updates - Participant feedback - Project adaptation - Stories of change Project risks and issues Sustainability Project finance Feedback for Gavi and the CSO fund mechanism
Final report	Basic grant information Vaccination reach, including your Reach Sheet Performance against outputs Approach, including: - Project delivery - Workplan - Stakeholder engagement - Gender equality and social inclusion (GESI) Monitoring, Evaluation and Learning, including: - Results framework reflections - Participant feedback - Project adaptation - Stories of change Project risks and issues

	Sustainability
	Project finance
	Feedback for Gavi and the CSO funding mechanism.

Each of these quarterly, six-monthly and final reports consist of the completion of a short written narrative template using Grantelope. Grantees may also be required to submit further documents, such as their updated Workbook, Reach Sheet and any stories of change, depending on the type of report and conditions of their grant agreement.

Grantees should only submit narrative findings and data for the relevant reporting period, apart from the final report when grantees should submit narrative findings and data for the whole project – including the final six-month period. This means that the data and evidence submitted, as well as the version of the project Workbook and Reach Sheet, will be different every reporting period.

In addition to this technical information, **grantees should submit their financial data every quarter**. More guidance on how to prepare and submit financial data can be found on the Gavi CSO funding mechanism website and specifically the 'Principles of reporting guidance' document.

How will my project reports be used?

Project reports submitted by grantees will be used in a variety of ways to support the Gavi CSO funding mechanism. For this reason, it is important that grantees submit full and timely reports and liaise with their Grants Manager if they have any issues in doing so.

At an individual project level, project reports help both Gavi and grantees to monitor progress and identify any areas where more support is needed. This also helps grantees achieve more successful and complete outcomes in their projects.

The Gavi CSO funding mechanism will collate information from all grantee reports and analyse these at a portfolio, or global level. This information will help Gavi, Alliance partners, government and other key stakeholders to understand the impact of CSO-led immunisation initiatives around the world.

How will my project reports be appraised?

To quality assure grantee data and evidence and to celebrate project successes or identify areas for further support, all grantee reports will be reviewed and appraised by the Gavi CSO fund management team.

Grants Managers will use standardised criteria to review grantee reports. Overall report scores will be collated as part of the funding mechanism's monitoring and evaluation. This data may also be shared with relevant Gavi, Alliance partners, government and other key stakeholders.

Six-monthly and final reports will be given an overall appraisal score on a scale of A+ to C.

This approach will help identify projects that need further support. Where needed, grantees and Grants Managers will then create a plan together to deliver support and help achieve project aims. Reports may also be returned to the grantee if they are incomplete or missing key information. The standardised appraisal criteria include the following:

Report Type	Appraisal Criteria	Appraisal questions
Quarterly report	Progress	How effective has the project been in: • Implementing activities • Tracking results • Responding to challenges and risks, and • Delivering activities in a timely manner.
	Gender Equality and Social Inclusion (GESI)	How effective has the project been in: • Designing a complete and informed GESI approach • Implementing a careful and realistic GESI approach • Engaging with key stakeholders throughout their GESI approach • Learning and adapting from their GESI approach.
	Quality of reporting	Is the report: • Complete • Presenting high quality content • Clear • Relevant • Accurate • Responding effectively to comments and recommendations made previously.
Six-monthly report and final reports	Outputs (35% of total score)	Has the project achieved its targets? • On track: 80% - 100%+ achievement • Getting there: 60% - 79% achievement • Off track: Under 60% achievement
	Vaccination Reach (25% of total score)	Has the project achieved its targets? • Exceeds expectations: reach is more than 40% higher than pre-project average • On track: reach is between 1% and 33% higher than pre-project average • Off track: reach is less than pre-project average •
	Learning (12% of total score in six-monthly report and 15% in final report)	How effective has the project been in: • Providing relevant data and analysis on their learning questions • Generating lessons learnt that are coherent within the wider project activities and context • Sharing clear lessons learnt

		• Generating impactful lessons learnt that are strategic, robust and/or innovative.
	Progress (7.5%) (only relevant for six-monthly report)	How effective has the project been in: • Implementing activities • Tracking results • Responding to challenges and risks, and • Delivering activities in a timely manner.
	Gender Equality and Social Inclusion (GESI) (7.5% of total score in six-monthly report and 10% in final report)	How effective has the project been in: • Designing a complete and informed GESI approach • Implementing a careful and realistic GESI approach • Engaging with key stakeholders throughout their GESI approach • Learning and adapting from their GESI approach.
	Sustainability (7.5% of total score in six-monthly report and 10% in final report)	How effective has the project been in: • Planning an effective sustainability strategy to ensure project benefits continue beyond the project • Demonstrating that the sustainability strategy is working in the project context • Learning and adapting to help strengthen the sustainability strategy.
	Quality of Reporting (5% of total score)	Is the report: • Complete • Presenting high quality content • Clear • Relevant • Accurate • Responding effectively to comments and recommendations made previously

When should my project submit reports?

Reporting frequencies and timelines are standardised across the funding mechanism, and grantees have 45 days to submit reports following the end of a reporting period (and 60 days for their project end report). Exact reporting dates can be found on Grantelope, the online grants management system, and in your grant agreement.

How should I prepare to submit my project reports?

To prepare for submitting project reports the following should be considered:

1. **Use Grantelope Platform:** Grantees will be registered on Grantelope, the Gavi CSO fund mechanism grant management platform, from the application stage. To review reporting requirements and timelines in advance please access Grantelope. Grantees are advised to

review the content of the reports from the start of the project to make sure the relevant information and data are collected.

2. **Read the Guidance:** Grantees should familiarise themselves with the technical and financial guidance and further guidance on preparing and submitting stories of impact and change will become available. Please let your Grants Manager know if you have any questions.

3. **Prepare required documents:**

   - Download the latest Project Workbook from Grantelope and prepare updates

   - Complete the Vaccination Reach sheet and make sure there is a robust data collection mechanism developed from the start of the project.

   - Narrative responses using the Grantelope form

4. **Use plain language:** Proofread for clarity, avoid jargon, and spell out acronyms.

5. **Verify information and data:** Double-check all figures and content for accuracy. Make sure information in the narrative report is consistent with Workbook and Vaccination Reach sheet data and information (where relevant). For approaches such as Gender Equality and Social Inclusion (GESI) or stakeholder engagement, refer to your project proposal to make sure they are aligned with the reporting.

6. **Provide context and analysis:** When contributing updates, go beyond simply sharing information; analyse the updates to highlight their relevance and impact on the project objectives. Ensure updates are connected to the workplan and results framework, demonstrating how they contribute to progress and support the achievement of the project goal.

7. **Submit early:** Start completing the reports as soon as the reporting period starts and avoid last-minute submissions to prevent potential issues with internet connectivity or technical delays.

8. **Contact your Grants Manager:** For any issues or clarifications, reach out to the Grants Manager well in advance of the submission deadline.

Where should I submit my project reports?

An overview on how to complete and submit project reports on Grantelope is available on the Gavi CSO funding mechanism website and specifically the 'Completing reports on Grantelope guidance' document.