

Partnerships for a Healthy Region

Annual Partner Progress Report Template with Guidance

Guidance is provided in italics – please delete italics before submission. Suggested section lengths are estimates intended to provide guidance.

Executive Summary

Approx 1 page.

This is a standalone section that summarises the following:

- *A high-level summary of achievements and an assessment of progress toward the project's End of Program Outcomes (EOPOs), Intermediate Outcomes (IOs) including gender equality, disability equity, climate change, One Health and other cross-cutting priorities during the reporting period.*
- *A statement whether the project is on track to achieve its outcomes (at the project end).*
- *Summary of any major lessons learned during the reporting period, and*
- *Any changes or updates in the context/risks that need to be considered.*

Context

Approx ½ page.

*Briefly summarise the **external context** in which the project is being implemented. Include emerging risks and/or opportunities that impact (or may impact) on your project's ability to achieve its outcomes, or agreed work plan. Note if the program logic and/or assumptions need to be updated.*

Progress towards project outcomes

Estimate 1 to 2 pages per EOPO, and ½ to 1 page per cross-cutting priority (large data tables can be annexed).

EOPOs and IOs should match your agreed program logic, or if your program logic has been revised (and approved by your program manager) upload your updated program logic in your SmartyGrants report update.

In summary this section will include:

- *whether the project is on track to achieve the EOPO (this assessment only needs to be at EOPO level and for each of your specific cross-cutting IOs. Use the rubric in Box 1 to guide your assessment).*

Box 1: Rubric to assess progress towards EOPOs and IOs	
ON TRACK	The project is on track to achieve the EOPOs and IOs
SOME DELAY	There is some delay, likely to be on track during the next reporting period
SIGNIFICANT DELAYS	There are significant delays, with a need to review the implementation approach or review the outcomes themselves.
TOO SOON TO TELL	It is too early to say if progress is on track.

- *Following the assessment of progress, provide evidence that supports this assessment. For each EOPO include reporting on the IOs that link to that EOPO. Think about your theory of change, and what evidence you have collected to demonstrate what change is occurring. For cross-cutting outcomes include evidence that demonstrate progress towards these.*
- *When reporting evidence include outputs achieved in the reporting period. Your proposed indicators outline what is useful data/evidence to present. Data can be presented in a narrative form or as a table.*
- *Data should be sex and disability disaggregated (where referring to number of people) and disaggregated by other sociodemographic variables/groups who experience social disadvantage where relevant and possible. (e.g. age, ethnicity, geographical location, etc). Where possible*

demonstrate progress to cross-cutting outcomes. For brevity, you can reference evidence reported in your cross-cutting IOs, or in the cross-cutting section of the report (see below).

- All evidence **should reference a country or region** (if regional activities). Where possible use tables to provide data.
- When describing the project outputs, include any data that demonstrates **the reach and/or the quality** of the output – e.g. are key people (disaggregated by sex at a minimum) involved in policy dialogue or behaviour change activities; have promotion or dialogue activities changed attitudes or been influential in decisions. Are the outputs as per targets (e.g. number of participants as expected, less or more).
- When reporting on capacity building and training activities, it is useful to **demonstrate how new skills, new systems etc are contributing to improvements** in services, delivery and contributing to the program outcomes.
- Describe any **significant delays, or challenges**, to progressing towards each EOPO. Include any actions proposed to address delays.
- This is a good time to consider whether the **Program Logic is (still) fit for purpose** for the program. Where changes are considered appropriate, please discuss with your program manager.
- Overall, in this section, DFAT is looking for **a clear, succinct narrative on what changes the project is contributing to, with evidence**.

Cross-cutting priorities

½ to 1 page per priority – note where relevant information/evidence is reported Progress to Outcomes section, you can reference previous mentions. There is no need to repeat the information.

PHR has the following cross-cutting priorities: gender equality, disability equity, social inclusion, engagement of First Nations Australians, climate and disaster responsiveness, One Health, and community engagement and locally led development. Gender equality, disability equity and rights, and climate change integration are required, all others are recommended.

GENDER EQUALITY - REQUIRED

All partners must address gender equality reporting criteria in full. Outline any challenges to progressing gender equality and strategies to address them.

- **Analysis:** Outline how your gender or GEDSI analysis, including any additional gender or GEDSI analysis, relevant consultations, and subsequent MEL data is being used to inform project implementation and decision making and to ensure the project takes a do no harm approach.
- **Strategies and activities:** Describe how your project is progressing implementation of its gender or GEDSI strategy or action plan and implementing activities to advance gender equality.
- **Meaningful engagement:** Outline how diversity and gender parity is being considered in implementation and governance structures and how representative organisations (including women's groups) are being involved in meaningful roles to support the project.
- **Resourcing:** Outline resource allocation (including human resources and expertise) that is in place to support gender equality related outcomes of the project.
- **Outcomes:** Outline how the project is delivering outcomes on gender equality. Provide reporting on your quantitative and qualitative indicators on gender (or rationale if indicators are not included). Expand on gender equality impact information included elsewhere in the report, supported by evidence (including sex disaggregated data and other quantitative and qualitative information, with consideration given to the intersection between gender and disability).

DISABILITY EQUITY AND RIGHTS - REQUIRED

All partners must address disability equity and rights reporting criteria in full. Outline any challenges to progressing disability equity and rights and strategies to address them.

- **Analysis of barriers:** Outline how your disability or GEDSI analysis, including any additional disability analysis or GEDSI analysis, relevant consultations and subsequent MEL data is being used to identify and address barriers to inclusion and participation of people with disabilities in your project.
- **Strategies and activities:** Describe how your project is progressing implementation of its disability or GEDSI strategy or action plan and implementing activities to advance disability equity.
- **Meaningful engagement:** Outline how persons with diverse disabilities and/or organisations of people with disabilities are being actively involved in meaningful roles to support project planning, decision making, governance, implementation and/or MEL. Provide evidence of meaningful and systematic participation.
- **Resourcing:** Outline resource allocation (including human resources and expertise) that is in place to support disability related activities and reasonable accommodations.
- **Outcomes:** Outline how the project is delivering outcomes for people with disabilities. Provide reporting on your quantitative and qualitative indicators on disability (or rationale if indicators are not included). Expand on disability equity impact information included elsewhere in the report, supported by evidence (including disability disaggregated data and other quantitative and qualitative information, with consideration given to the intersection between disability and gender).

SOCIAL INCLUSION – OPTIONAL

Partners are encouraged to report on social inclusion where relevant to activities and expected outcomes, noting you may opt to report on this as a case study. Outline any challenges to progressing social inclusion and strategies to address challenges.

- **Strategies and activities:** Outline how your project is progressing implementation of activities to advance social inclusion outcomes.
- **Meaningful engagement:** Outline how groups who experience social disadvantage and/or their representative groups are being actively engaged in planning, decision making, governance, implementation and/or MEL.
- **Outcomes:** Outline how the project is delivering outcomes for people who experience social disadvantage. Expand on impact information included elsewhere in the report, supported by evidence (including disaggregated data, qualitative and quantitative information).

ENGAGEMENT OF FIRST NATIONS AUSTRALIANS – OPTIONAL

Partners are encouraged to report on the engagement of First Nations Australians where relevant to activities and expected outcomes (can use a case study if useful). Outline any challenges to progressing engagement of First Nations Australians as planned during design, and strategies to address challenges.

- **Strategies and activities:** Outline how your project is incorporating the perspectives of First Nations Australians into planning, decision-making, governance, implementation, and/or MEL, including supporting exchange and partnerships between First Nations Australians and in-country partners.
- **Meaningful engagement and resourcing:** Provide detail on the principles underpinning this engagement (e.g. cultural safety, equitable partnerships, transparency), how the engagement is meaningful and mutually beneficial and the resourcing available to support this work.
- **Outcomes:** Outline the outcomes being delivered as a result of this engagement, including for First Nations organisations, communities and/or individuals and partnerships with in-country counterparts.

CLIMATE CHANGE INTEGRATION - REQUIRED¹

All projects should aim to address climate integration questions. If they are unable to report on climate, they should confirm with their Program Manager prior to report submission.

¹ DFAT reporting on climate change integration will be mandatory for projects commencing in FY2025-26.

Provide a summary (with evidence) of the key contributions to strengthening climate and disaster responsiveness, with the changes that have occurred as a result. If this data/evidence is included in your outcomes, please reference and no need to repeat. In summary:

- Include details of how climate analysis is informing your project – where possible link this to where the WHO operational framework for climate resilient and low carbon health systems aligns with your project. ([Operational framework for building climate resilient and low carbon health systems \(who.int\)](#))
- How have your project activities during this reporting period adapted or responded to climate-related impacts? How have you used climate data or climate analysis to inform delivery of your project?
- How has your project integrated climate and disaster responsiveness and risks into relevant policies and plans?
- Describe any actions that reduce or avoid greenhouse gas emissions, improve carbon sinks and support the transition to low-emission economies.
- How has your MEL system captured results of, or any learning, to address climate change?
- What budget have you allocated to climate change?

ONE HEALTH - OPTIONAL

- How does your project contribute to partner countries or regional networks utilising a One Health approach?
- How have different sectoral and community-based partners been engaged in your project?
- What One Health outcomes are you aiming for? Include reference to the One Health High Level Expert Panel's theory of Change and/or the Quadripartite One Health Joint Plan of Action and relevant regional or country-specific plans if these exist.
- Provide a summary (with evidence) of the key contribution to One Health outcomes, noting any changes as a result. If this data/evidence is included in your reporting on outcomes, please reference.

COMMUNITY ENGAGEMENT AND LOCALLY LED DEVELOPMENT - OPTIONAL

- How does your project engage communities and contribute to locally led development?
- How has your project meaningfully engaged local representative organisations?
- How has your project implemented delivery models that promote local capacity development and ownership to support sustainable outcomes?

DFAT has published a Guidance Note on [Locally-led development](#) to provide further information.

Project Management

Approx 1.5 to 2 pages for the section.

EXPENDITURE AND FINANCIAL MANAGEMENT

Annex the financial report, showing expenditure against the agreed budget in the signed agreement. This should include country level expenditure (by country)*:

- For the reporting period: planned budget, actual expenditure, and variance (\$ and %)
- Total budget, cumulative actual expenditure to end of the reporting period, and variance (\$ and %)
- Cash position at end of reporting period: Opening cash balance, tranches received in the reporting period, interest earned on PHR funding, cash expensed, closing cash balance

In the body of the report, provide a narrative summary of overall tracking of actual expenditure against planned budget, for the reporting period, and cumulative expenditure to date. If significant variance (above 10%) overall, or for specific line items, summarise why the variance has occurred (e.g. delays in implementation in a particular country, escalating/unanticipated costs of an activity).

Outline whether there is sufficient budget allocation to deliver activities to achieve outcomes – including to deliver gender equality and disability equity plans, First Nations engagement and/or climate action plans.

***Country Expenditure:** *If possible, and in accordance with the methodology used to develop the initial program budget, please report any expenditure directly attributable to activities in a specific country. Any shared/central costs may be allocated on a pro-rata basis according to direct country level activity/expenditure. Please discuss with your program manager to determine an appropriate and agreed methodology for doing this for your program.*

EFFICIENCY

Describe the projects efforts to use resources efficiently and economically. Identify areas where the project has shown value for money. DFAT's value for money principles are [here](#). Has implementation of the annual plan progressed as expected? What factors if any have impacted on implementation?

GOVERNANCE

Describe the project's governance arrangements. How has advice from these groups informed programming? How have representative organisations (including women's groups and organisations of persons with disabilities) been involved in governance mechanisms, including offering advice on cross-cutting priorities?

RISK MANAGEMENT

Summarise any change in major risks or any emerging risks. Explain actions taken to effectively manage risk. Provide detail on how sexual exploitation, abuse and harassment (SEAH); child protection; and Environmental and Social Safeguards risks are managed. Outline how your project is mitigating and managing gendered risks or risks to people with disabilities and other groups who experience social disadvantage, to ensure the project does no harm. Annex the updated Risk Matrix.

MONITORING, EVALUATION AND LEARNING

Summarise key MEL arrangements in place. Annex the project's program logic, if it has been developed or updated in the reporting period. Consider whether the program logic is still fit for purpose, and if not, why. Include learning in section below. Outline how the M&E system collects and uses sex and disability disaggregated data and includes indicators to measure cross cutting priorities including gender equality and disability equity outcomes. Include details of any reviews or evaluations undertaken in the period, uploaded to the SmartyGrants file.

Summary of lessons learned.

Approx ½ to 1 page.

Briefly summarise key lessons learned, challenges or insights, and any implications for DFAT programming more broadly. Note any management recommendations/ management responses relevant to project learning.

Certification

Include certification of the report

ANNEXES

Note Annexes are uploaded in SmartyGrants

- Annual Work Plan (if available)
- Program Logic (if updated during the reporting period)
- Monitoring, Evaluation and Learning Framework (if updated during the reporting period)
- Monitoring, Evaluation and Learning Plan (if updated during the reporting period)
- GEDSI Analysis (if updated during the reporting period)
- GEDSI Strategy or Action Plan (if updated during the reporting period)
- Risk Register (updated)
- Financial Acquittal- Refer details in Finance Management Section above.
- Case studies, communications materials etc.
- Share or upload any external reviews or evaluations completed during the reporting period.

Resources

(this section is a list of resources available to assist in writing the report– not a section of the report)

[DFAT Monitoring, Evaluation and Learning Standards](#) – Standard 6 covers progress reports.

[DFAT Gender equality in monitoring and evaluation: Good Practice Note](#)

[DFAT Disability inclusive development guidance note](#)

[DFAT Guidance Note - Integrating GEDSI into MEL processes within DFAT Health Programs Sep2023](#)

[DFAT Guidance Note: Locally-led development](#)

[DFAT Guidance note: Our development cooperation is enhanced by First Nations Australians' perspectives](#)

[DFAT Tier 2 Indicator Technical Notes](#)