



## NARRATIVE GUIDANCE

The guidance below provides detailed instructions for completing each section of the Narrative templates, including Proposal, all Progress Reports, and Completion Report.

Use the blue links below to quickly access the following guidance sections:

1. [General Narrative Guidance](#)
2. [Proposal Guidance](#)
3. [First Quarter Report Guidance](#)
4. [Midterm Report Guidance](#)
5. [Third Quarter Report Guidance](#)
6. [Completion Report Guidance](#)

### 1. GENERAL NARRATIVE GUIDANCE

There are several guiding recommendations that apply generally to all questions in the Narrative grant templates. Please follow these recommendations throughout.

#### 0.1 Pre-Filled Content

- All questions requiring a YES or NO response have been pre-filled with “YES // NO.”
  - Please select either YES or NO and delete the other response.
  - Example:

Template:

<b>Contracted Implementers</b> Are there other implementing organizations or entities that will be contracted to do work for this program?	YES // NO
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Your Response:

<b>Contracted Implementers</b> Are there other implementing organizations or entities that will be contracted to do work for this program?	NO
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- Many questions include example responses in the template.

To avoid confusion, please delete these examples and replace them with responses relevant to your program.

- Example:

Template:

[Admin Unit 1]	[Admin Unit 2]	[Admin Unit 3]
<i>Example: Western Region</i>	<i>Sindhuli District</i>	<i>Ratanchura Solpathana</i>



Your Response:

Admin Unit 1 for your program	Admin Unit 2 for your program	Admin Unit 3 for your program
<i>Admin unit name for your program</i>	<i>Admin unit name for your program</i>	<i>Admin unit name for your program</i>

**0.2 Addressing Multiple Contexts in the Same Response Field**

- The answers to some questions may vary for the different contexts, technology types, or locations in which you work (e.g. communities vs. schools)
- In many questions, we have explicitly asked you to copy a response table or add rows to a table for each unique context. Please follow the instructions provided in the template in these instances.
- However, several questions ask you to respond to the question for all contexts within the same response field. In these instances, please add structure to your response to clearly distinguish between the different contexts.
  - Example:

<b>Fee Structure &amp; Financial Management</b>	
<i>What is the fee structure, fee amount, and frequency of user contributions?</i>	
<u>Community:</u> In the community, households pay on an HH-level (not an individual level) on a scale depending on income. Ultra poor households pay \$0.50 USD, poor households pay \$0.75 USD, medium households pay \$1 USD on the first week of every month during the community meeting.	
<u>School:</u> In the schools, the district government pays \$10 USD per month to the school maintenance fund. Parents pay \$0.10 per month per child.	
<i>Please list the average projected cost of annual maintenance for one water point of this type of technology (include currency units):</i>	<u>Community:</u> \$20 USD <u>School:</u> \$35 USD

**0.3 Cross Checking with Program Profile**

- There are several areas where the Proposal Narrative overlaps with the Program Profile. Please make sure the information in the Proposal Narrative and Program Profile are consistent with one another.



PROGRAM  
PROFILE

**PROPOSAL**

FIRST QUARTER  
REPORT

MIDTERM  
REPORT

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COMPLETION  
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## PROPOSAL GUIDANCE

Use the blue links below to quickly access the following guidance sections:

### 1. ORGANIZATION INFORMATION

#### 1.1 *Proposal Overview*

1.1a) Partner & Grant Information

#### 1.2 *Financing & Contracts*

1.2a) Income & Revenue

1.2b) In-Kind Contributions

1.2c) Program Cost Changes

1.2d) Contracted Implementers

### 2. PROPOSAL DETAILS

#### 2.1 *Program Areas for this Proposed Grant*

2.1a) Proposed charity: water Program Areas

2.1b) Changes in Program Areas

2.1c) Achieving Access

#### 2.2 *Grant Details*

2.2a) Grant Alignment with Program Strategy

2.2b) Learnings & Results

2.2c) Implementation Activities and Details

### 3. GRANT OUTPUTS

#### 3.1 *Proposed Outputs*

3.1a) Water Outputs

3.1b) Sanitation Outputs

3.1c) Hygiene Outputs

3.1d) Other Outputs

#### 3.2 *Water Quality Testing*

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3.2b) charity: water Testing Requirements

### 4. PRE- AND POST-IMPLEMENTATION ACTIVITY SUPPORT

#### 4.1 *PPIA Activities*

4.1a) PPIA Activities

4.1b) PPIA & Program Goals

4.1c) Other Pilot Activities

4.1d) PPIA & Program Activities Program Goals Measurement



## **5. M&E, MAP FRAMEWORK AND PROGRAM OUTCOMES**

### ***5.1 MAP Framework Component(s) Required***

### ***5.2 MAP Framework Implementation Details***

- 5.2a) Staffing and Structure of Data Collection Team
- 5.2b) MAP Data Collection Timeline (if applicable)
- 5.2c) Water Quality Testing (if applicable)
- 5.2d) MAP Training (if applicable)
- 5.2e) MAP Indicators (if applicable)

### ***5.3 Other Monitoring and Evaluation Activities***

## **6. RISKS & CHALLENGES**

## **7. ADDITIONAL COMMENTS**



## 1. ORGANIZATION INFORMATION

### 1.1 Proposal Overview

#### 1.1a) Partner & Grant Information

- **Organization name** - Your organization name
- **Program country** - Country for proposed funding under this grant proposal from charity: water
- **Program name** - Title of the proposed program, if applicable
- **Grant period (dates)** - Proposed start date and end date for this grant period/program cycle in a date format (mm/dd/yyyy). This is typically 13-months, starting either February 1 or August 1, and should include the final month dedicated to completion reporting.
- **Grant ID** - To be provided by charity: water in your Request for Proposal. If an ID is not available at the time of the Request for Proposal, this will be provided during the revision process and filled in prior to the finalization of the Proposal. This is the unique grant identifier for the duration of the grant and will be used on Narrative, Budget and Water Points List documents.

### 1.2 Financing

#### 1.2a) Income & Revenue

<b>Country budget (in USD):</b>	<i>Your organization's estimated or finalized 2019 country budget, inclusive of all sector funding</i>	
<b>Country WASH budget (USD):</b>	<i>The estimated or finalized 2019 budget for this particular country program only including WASH work</i>	
<b>Expected co-financing for this program (USD):</b>	<i>The total co-financing for this program, as a sum of the four fields below. This should be secured or committed/expected funding and should <u>not</u> include in-kind contributions.</i>	
<b>Source(s) of co-financing:</b>	<b>Community contributions (USD):</b>	<i>Amount expected to be funded by community contributions</i>
	<b>Government contributions (USD):</b>	<i>Amount expected to be funded by any level of government that will be directly applied to the program funded by charity: water</i>
	<b>Other organizations (USD):</b>	<i>Amount of inbound funding from other donors co-financing this country program, including funding (even if from other sectors aside from WASH) that contributes to shared administrative costs</i>
	<b>Other (USD):</b>	<i>Any other funding that will go towards this program</i>

#### 1.2b) In-Kind Contributions

- Select YES or NO and delete the other response.



- If YES, briefly describe .

**1.2c) Program Cost Changes** (only answer if program has been previously funded by charity: water)

- Select YES or NO and delete the other response.
- If YES, briefly describe the circumstances or justification for why the costs changed by +/- 15%.
- Example:

Has the Cost per Person and/or the Cost per Water Point changed by +/- 15% since the last charity: water grant?	YES
<p><i>If yes, briefly explain:</i> Due to the increased number of mechanized boreholes to tap stands in this grant and the dramatic increases in the cost of fuel since the border blockage, the cost per person has increased by 19% (from \$30.10 to \$35.70) and the cost per water point has increased by 16% (6,000 USD to 6,960 USD).</p>	

**1.2d) Contracted Implementers**

- Select YES or NO and delete the other response.
- If NO, delete the **Contracted Implementer** table.
- If YES, for each contractor or implementer receiving a contract of \$4,000 or more, complete the **Contracted Implementer** table with the following details:
  - **Contracted Implementer** – Fill in the organization or name of the contracted implementer (e.g. Atco Drilling Company). If you do not have this information in at the time of the Proposal, describe their function here (e.g. Well Driller).
  - **Contract Type** – This should be the type of contract used to hire or engage a 3<sup>rd</sup> party implementer. Some of the examples include: Bill of Quantity (BOQ) or No Water No Pay. If there is no contract, write “N/A” and explain in the box at the end of the table.
  - **Activities responsible for** – List the activities for which the contracted implementer is responsible. Please be brief. For example, this can be “Drilling all deep boreholes in Chelsea District” or “Implementing all sanitation activities in school water points for this grant”.
  - **Number of water points** - This refers to the number of water points or sites that the implementer will work with. This can be both hardware activities or software activities.
  - **Explanation** - Use this field to describe why and how you chose this implementer, the rationale for contract type, how you plan for and enforce work guarantees, your process for hydrogeological studies, etc. If you have a vendor selection process that you followed for this contractor, explain the policy and how you implemented against it. If there is no contract, explain why not.
- Copy this table as many times as needed to list all 3rd party or contracted implementers.

**2. PROPOSAL DETAILS**

**2.1 Program Areas for this Proposed Grant**

**2.1a) Proposed charity: water Program Areas**



- Program Area = location
- Refer to the Request for Proposals for the latest grant cycle or prior conversations with charity: water regarding the level of specificity for this section.
- This should refer to more targeted programs (e.g. Sub-Districts, Hamlets, etc) that relate to the broader Program Areas reflected in section 2.1b in the Program Profile.

### 2.1b) Changes in Program Areas

- Only answer if program has been previously funded by charity: water
- A change could include adding new program locations, expanding into new Sub-Regions or Sub-Districts, and/or shifting to a different area of the country.
- Select YES or NO and delete the other response.
- If YES, explain how and why these program locations have changed.

### 2.1c) Achieving Access

- Select YES or NO and delete the other response.
- If YES, explain how the water points proposed under this grant will meet the definition of access explained in section 1.5a of your Program Profile.
- If NO, explain why the water points will not meet the definition of access defined in section 1.3a of your Program Profile and how your organization will address this moving forward.

## 2.2 Grant Details

### 2.2a) Grant Alignment with Program Goals

- Referring to the details in the Program Profile, explain how the main objectives, activities, and progress of this proposed grant will advance or contribute to the larger goals of your WASH program with charity: water.
- This section should provide details for how this grant fits into a greater WASH strategy.
- Please ensure this section is not a duplication of the content provided in your Program Profile. It should reference the strategy you've described in your Profile, but only to explain how the proposed grant aligns with and advances it.

### 2.2b) Learnings & Results

- Please detail how lessons from your organization's previous work (funded by charity: water or otherwise) or results from the MAP Framework will be incorporated into this proposed grant. This may include technical improvements, process or management improvements, strategies to mitigate against challenges encountered in the past, and support to past charity: water funded programs or water points where extra support is needed to improve or sustain results. Please be as specific as possible.
- It is suggested that you use subheaders to organize this section by learning/result. For example:

***Low water quality in piped systems*** - Our 2019 MAP results showed 40% of our piped system projects had water quality with high risk of diarrheal disease. In this grant, we will target improved water quality by incorporating in-line chlorination into each piped system. We will also invest in additional water quality management training for caretakers, water management committees, and the general community.



### 2.2c) Implementation Activities and Details

- This section should be used to describe the activities and details of this grant proposal and should align with your submitted Work Plan, including the water technologies and sanitation and hygiene approaches being implemented. This does not need to be a line-by-line description of your Work Plan, but all activities on your Work Plan should be accounted for within the description you provide.
  - It is suggested that you use subheaders to organize this section by the high-level activities in your grant, so it is easy to see where the activities in your Work Plan fit in. (e.g. pre-implementation assessments, community mobilization, water committee formation, water point construction, sanitation & hygiene education, water point handover, monitoring, etc.). Please use activity subheaders that are relevant for your program/implementation.
  - Where possible, please include and highlight the incorporation of lessons learned from prior grant cycles listed above and/or the results from the MAP Framework.
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## 3. GRANT OUTPUTS

### 3.1 Proposed Outputs

- Complete tables 3.1a-3.1d for all proposed outputs of the grant.
- This should include hardware outputs (e.g. individual water points, tap stands, etc.) as well as indirect or training outputs (e.g. # of people trained, # of teachers trained, # of latrines built, etc.).
- Include units and add or remove rows from each table as needed.

#### 3.1a) Water Outputs

- **Total daily water users** - The estimated total number of daily water users that will be served at the completion of this grant. We recognize that this number may not capture the distinct beneficiaries for this specific grant. This number is intended to capture the daily water users for individual water points within this grant. This should match the Total Daily Water Users column (column U) on the Water Points List. This output is required from all partners.
- **Unique daily water users** - The estimated unique number of daily water users that will be served at the completion of this grant. This number is intended to mitigate against double-counting by removing beneficiaries served by multiple water points within this grant (e.g. both a community and a school water point) and beneficiaries served by water points under past charity: water grants. This should match the number of Unique Daily Water Users (column W) on the Water Points List. If you don't know all of your specific sites at Proposal, this may be the same as the Total Daily Water Users. This output is required from all partners.
- **Water points to be completed** - This is the total number of water points that will be completed by the grant. This output is required from all partners.
- **Sub-water points to be completed** - The number of sub-water points to be completed in this grant. Refer to your RFP for instructions on which outputs should be provided here. If your RFP does not instruct you to provide additional outputs, remove these rows from the table. Examples of sub-water points include household Bio-Sand Filters.





- If implementing Piped Systems, the number of systems in the grant should be added to the table as a sub-water point (the count of “Water water points to be completed” in the section above will capture the number of tap stands).
- Add or remove rows from the table as needed.

**3.1b) Sanitation Outputs**

- Refer to your RFP for instructions on which outputs should be provided here.
- Add or remove rows from the table as needed.
- If your RFP does not instruct you to provide sanitation outputs, remove this table.

**3.1c) Hygiene Outputs**

- Refer to your RFP for instructions on which outputs should be provided here.
- Add or remove rows from the table as needed.
- If your RFP does not instruct you to provide hygiene outputs, remove this table.

**3.1d) Other Outputs**

- Refer to your RFP for instructions on which outputs should be provided here.
- Add or remove rows from the table as needed.
- If your RFP does not instruct you to provide additional outputs, remove this table.

- For each output, provide the following information:
  - A non-numerical general description of the output
  - The proposed number of outputs to be achieved
  - Example:

<b>3.1c) Hygiene Outputs:</b>	
<i>School WASH committees trained</i>	<i>345 WASH committee trainings 1,122 teachers and principals trained</i>

**3.2 Water Quality Testing**

- For all new and rehabilitated water points included in a grant, charity: water requires verification that water quality meets minimum requirements prior to handing water points over to the community or institution.

**3.2a) Water Quality Parameters and Quantities**

- Describe your specific plans for conducting water quality testing on water points to be constructed or rehabilitated in the proposed grant.
- You can refer to the information provided in the Program Profile section 2.4 as needed.

**3.2a) charity: water Testing Requirements**

- Refer to your RFP for instructions on which parameters are required for your program.
- Select YES or NO and delete the other response.

**4. PRE- AND POST-IMPLEMENTATION ACTIVITY SUPPORT (if applicable)**



Specific support for Pre- and Post-Implementation Activities (PPIA) is available for partners starting in the second grant cycle. PPIA can cover activities to support water points constructed outside of the 12-month grant cycle for this proposal as well as long-term sustainability of charity: water funded work. PPIA activities can comprise up to 5% (to a maximum of \$150,000) of this proposed grant budget. Please refer to the charity: water Request for Proposal (RFP) for this grant cycle to determine if you are eligible for PPIA support and for further details.

**4.1 PPIA Activities**

**4.1a) PPIA Activities**

- This section should serve as an explanation for how you will use PPIA funding in this grant proposal
- You can use bullet points or headers to break out the activities by theme
- Any activity included that requires budget support should also be reflected in the Budget template as line items labeled with PPIA and be reflected in the Methodology tab.

**4.1b) PPIA & Program Goals**

- PPIA is part of our Pipeline program and is intended to support sustainability efforts of charity: water-funded programs
- Explain how PPIA Activities will support the 1) sustainability of the program or water points funded by charity: water, and 2) achieve the targets for your overall program

**4.1c) Other Pilot Activities**

- If you are piloting other non-PPIA activities, aimed at improving project or program sustainability in this grant (e.g. piloting a new water quality treatment component on your planned projects), describe them here
- This should only include activities additional to the PPIA activities described above. If there are no additional pilot activities planned, state that below.

**4.1d) PPIA & Pilot Activities Program Goals Measurement**

- Note: this section only needs to be filled in if requested in the RfP or during proposal development
- It is expected that proposed PPIA activities and pilots are data driven and targeting program indicators that are important to charity: water ([charity: water MAP Indicators](#))
- Complete the table for all PPIA and pilot activities described above, including:
  - The associated budget line(s) in your DETAIL - Budget tab
  - The [charity: water MAP Indicator](#) the activity is targeting
  - The method and timeline for assessing the proposed improvement
  - Example:

PPIA or Pilot Budget Line	charity: water MAP Indicator	Assessment Method and Timeline
<i>Example: (PPIA) Facilitation of minor maintenance as not covered by a contractor guarantee</i>	<i>Example: % of constructed water points fully functional on the day of visit</i>	<i>Example: Record of repairs completed, will be submitted at completion of the 2H 2019 grant</i>



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## 5. MAP FRAMEWORK AND PROGRAM OUTCOMES

### 5.1 MAP Framework Component(s) Required

#### 5.1a) MAP Effort(s) in this Grant Cycle

- Refer to your Request for Proposal for the MAP Framework effort to list here.
- The options include: Major Review Baseline, Major Review Endline, Annual Check-In, Post-Implementation Monitoring (PIM) or N/A
- If you are completing a Major Review Endline or Annual Check-In, list the charity: water grant number that will be measured

### 5.2 MAP Framework Implementation Details

#### 5.2a) Staffing and Structure of Data Collection Team

- Explain how you will staff and structure the MAP team.
- Be specific in the quantity of each role, the responsibilities of each role, whether they are temporary or permanent staff, and any other relevant details to help in the planning process.
- Include which position will be the primary point of contact for charity: water during the data collection process.
- For questions about how to staff the MAP team, please refer to the MAP section of the Partner website

#### 5.2b) MAP Data Collection Timeline (if applicable)

- Detail the data collection timeline for the MAP Framework components you are completing for this grant cycle.
- This timeline should include the duration of the data collection (how many days or weeks you anticipate this collection to take) and which months you will collect data.
- For guidance, please refer to the MAP section of the Partner website

#### 5.2c) Water Quality Testing (if applicable)

- If you are completing the Major Review Baseline, Major Review Endline, or PIM, you are required to do some effort of Water Quality Testing as part of the MAP Framework requirements
- If this applies, explain how you will perform and manage the water quality testing effort
- This should include: who will perform the water quality testing collection and/or testing, what tests you will perform (including the parameters and the tests themselves), and any other relevant details (e.g. sending to a lab instead of testing in the field, etc).

#### 5.2d) MAP Training (if applicable)

- Please provide details on when you prefer to hold or host a training, where this training will be, which areas we will have access to for field training,
- Include a list of training participants and their respective roles.
- For more details, refer to the MAP section of the Partner website

#### 5.2e) MAP Indicators (if applicable)



- Of the charity: water MAP indicators, list 3-5 indicators that are most relevant to your program or most aligned with your own monitoring framework for this funding cycle.
- These indicators should be drawn from 2 or more categories of indicators (e.g. not all indicators should be related to Water Access)

### **5.3 Other Monitoring and Evaluation Activities**

- Describe any other Monitoring & Evaluation activities that are planned for this grant period.
  - This should only include activities additional to the charity: water MAP Framework requirements described above.
  - If there are no additional M&E activities planned, state that below.
- 

## **6. RISKS & CHALLENGES**

- Complete the **Risks & Challenges** table including:
    - **Risk/Challenge** – In one sentence, state the anticipated risk(s) or challenge(s) to implementation and the completion of the grant.
      - Consider including challenges highlighted in past completion reports, or encountered during current implementation that remain unresolved or require active mitigation measures.
    - **Likelihood** - State the likelihood of each risk affecting the program as either high, medium, or low.
    - **Level of Severity** - State the level of severity of each risk to the program as either high, medium, or low.
    - **Mitigation** – Provide a brief explanation of how you will mitigate each risk.
  - Add or remove rows from the table as needed.
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## **7. ADDITIONAL COMMENTS**

If you need to communicate something additional that isn't captured in the template, provide any additional comments here.



PROGRAM  
PROFILE

PROPOSAL

**FIRST QUARTER  
REPORT**

MIDTERM  
REPORT

THIRD QUARTER  
REPORT

COMPLETION  
REPORT

## FIRST QUARTER REPORT GUIDANCE

<b>Grant ID:</b>	The charity: water grant ID
<b>Reporting Dates:</b>	The implementation dates you are reporting on in the first quarter report, in the following format: mm/dd/yy - mm/dd/yy

### 1. PROGRAM PROGRESS

#### 1.1 Key Program Outputs To-Date

- **Water points completed** - Number of water points that have been completed as of this progress report. For the purpose of this report, completed water points and people served are water points that are in use by communities and associated people served. Please note that these can be estimates.
- **People served** - Number of people who have been served by the water points completed as of this progress report. This information is required for all progress reports.
- **Sub-water points to be completed (if applicable)** - Number of sub-water points that have been completed as of this progress report. Refer to your approved Proposal Narrative (section 3.1a) for any additional sub-water points outputs that should be provided here. (These are usually higher or lower levels of water point inventory. For example, the number of systems, if implementing Piped System inventory). If you have no progress to report on a given output at this time, list it in the table and indicate either 0 or N/A. If your Proposal Narrative did not include additional sub-water point outputs, remove this row from the table.
- **Sanitation or hygiene outputs (if applicable)** - Number of sanitation and hygiene outputs that have been completed as of this progress report. Refer to your approved Proposal Narrative (sections 3.1b - d) for any additional outputs that should be provided here. If you have no progress to report on a given output at this time, list it in the table and indicate either 0 or N/A.

#### 1.2 Changes to Outputs

##### 1.2a) Have there been any changes to the Water Points List since the proposal?

- Select YES or NO and delete the other response.
- If NO, remove the **Affected or Added Water Points** table from the template before submitting your report.
- Minor project data or Water Points List changes should not be included here. Only respond “YES” and provide details in the **Affected or Added Water Points** table for the following types of changes:
  - Any change in the total number of water points
  - Any change in technology type
  - Any change in location type
  - A decrease in total people to be served by the grant by 20% or more



- Water points affected by the same change should be reported on in aggregate within the same row.
- The table below provides examples of each type of change:

Affected or added water points	Description of change
<b>Example of a change in total water points:</b>	
2 new water points	We are able to construct 2 more water points than originally proposed. These new water points will be spring protections in communities.
281.441 - 281.450	Due to increased demand for household filters in other communities, the total number of communities to be served under this grant will be reduced to 440.
<b>Example of a change in technology type:</b>	
281.001 - 281.005	These school water points will now also receive latrines and will be reflected as Water Point & Sanitation inventory in the next report
All hand-dug wells	All hand-dug well water points will now be drilled wells
<b>Example of a change in location type:</b>	
15 community water points	15 of our proposed community water points have been replaced with 15 school water points.
<b>Example of a decrease in population served:</b>	
All water points	Overall people served has decreased from 12,000 at proposal to 8,500 due to lower than anticipated household populations.

### 1.3 Changes to Activities

#### 1.3a) Have there been any notable delays to the activities in your proposed Work Plan?

- Select YES or NO and delete the other response.
- If YES, complete the **Delayed Activities** table, including:
  - **Delayed activity** - This is the name of the activity from your Proposal Work Plan.
  - **New target date** - This is the new target completion date for this delayed activity.
  - **How will you get back on track?** - Briefly describe how you will accommodate this delay/adjust your Work Plan to ensure overall grant implementation remains on track.
- If NO, remove the **Delayed Activities** table from the template before submitting your report.

#### 1.3b) Have any activities in your proposed Work Plan been canceled?

- This refers to activities that will no longer be conducted as part of this grant.
- Select YES or NO and delete the other response.
- If YES, complete the **Cancelled Activities** table, including:
  - **Canceled activity** - This is the name of the activity from your proposal Work Plan.
  - **Reason for cancellation** - Briefly explain why this activity is being canceled from the grant.



- If NO, remove the **Canceled Activities** table from the template before submitting your report.

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## 2. FINANCIAL PROGRESS

*charity: water requires partners to closely track underspends, as we would like all funds spent and all underspends reinvested back into the program as early as possible to avoid no-cost extensions.*

### 2.1 Spending & Forecast

- **Amount spent to date** - This is the amount you've spent during the first quarter reporting dates.
- **Forecasted spending until next report** - This is the amount you will spend during the next quarterly reporting period (your midterm reporting dates).

### 2.2 Changes from Proposal Budget

#### 2.2a) Have there been any major changes that affect the budget assumptions submitted in the final approved grant Proposal?

- Select YES or NO and delete the other response.
- If YES, briefly explain how you will reinvest these savings or additional funds into the program moving forward.

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## 3. ADDITIONAL COMMENTS

If you need to communicate something additional that isn't captured in the template, provide any additional comments here.

### IMPORTANT:

If this is your first grant with charity: water, The Budget, Work Plan, and Water Points List are required for your first quarter update.

If this is not your first grant with charity: water, the Budget, Work Plan, and Water Points List are not required for your first quarter update unless requested by your charity: water representative. Depending on the significance of the changes described in section 1.2 and the financial information provided in section 2, you may be asked to provide a Budget and/or Water Points List.



PROGRAM  
PROFILE

PROPOSAL

FIRST QUARTER  
REPORT

**MIDTERM  
REPORT**

THIRD QUARTER  
REPORT

COMPLETION  
REPORT

## MIDTERM REPORT GUIDANCE

<b>Grant ID:</b>	The charity: water grant ID
<b>Reporting Dates:</b>	The implementation dates you are reporting on in the midterm report, in the following format: mm/dd/yy - mm/dd/yy

### 1. PROGRAM PROGRESS

#### 1.1 Key Program Outputs

##### 1.1a) Program Outputs To-Date:

- **Water points completed** - Number of water points that have been completed as of this progress report. For the purpose of this report, completed water points and people served are water points that are in use by communities and associated people served. Please note that these can be estimates.
- **People served** - Number of people who have been served by the water points completed as of this progress report. This information is required for all progress reports.
- **Sub-water points to be completed (if applicable)** - Number of sub-water points that have been completed as of this progress report. Refer to your RFP for instructions on which outputs should be provided here. If your RFP does not instruct you to provide additional outputs, remove this row from the table.
- **Sanitation or hygiene outputs (if applicable)** - Number of sanitation and hygiene outputs that have been completed as of this progress report. Refer to your RFP for instructions on which outputs should be provided here. If your RFP does not instruct you to provide additional outputs, remove this row from the table

#### 1.2 Changes to Outputs

##### 1.2a) Have there been any changes to the Water Points List since the last report?

- Select YES or NO and delete the other response.
- If NO, remove the **Affected or Added Water Points** table from the template before submitting your report.
- Minor project data or Water Points List changes should not be included here. Only respond “YES” and provide details in the **Affected or Added Water Points** table for the following types of changes:
  - Any change in the total number of water points
  - Any change in technology type
  - Any change in location type
  - A decrease in total people to be served by the grant by 20% or more
- Water points affected by the same change should be reported on in aggregate within the same row.



- The table below provides examples of each type of change:

Affected or added water points	Description of change
<b>Example of a change in total water points:</b>	
2 new water points	We are able to construct 2 more water points than originally proposed. These new water points will be spring protections in communities.
281.441 - 281.450	Due to increased demand for household filters in other communities, the total number of communities to be served under this grant will be reduced to 440.
<b>Example of a change in technology type:</b>	
281.001 - 281.005	These school water points will now also receive latrines and will be reflected as Water Point & Sanitation inventory in the next report
All hand-dug wells	All hand-dug well water points will now be drilled wells
<b>Example of a change in location type:</b>	
15 community water points	15 of our proposed community water points have been replaced with 15 school water points.
<b>Example of a decrease in population served:</b>	
All water points	Overall people served has decreased from 12,000 at proposal to 8,500 due to lower than anticipated household populations.

### 1.3 Changes to Activities

#### 1.3a) Have there been any notable delays to the activities in your proposed Work Plan?

- Select YES or NO and delete the other response.
- If YES, complete the **Delayed Activities** table, including:
  - **Delayed activity** - This is the name of the activity from your Proposal Work Plan.
  - **How will you get back on track?** - Briefly describe how you will accommodate this delay/adjust your Work Plan to ensure overall grant implementation remains on track
- If NO, remove the **Delayed Activities** table from the template before submitting your report.

#### 1.3b) Have any activities in your proposed Work Plan been canceled?

- This refers to activities that will no longer be conducted as part of this grant.
- Select YES or NO and delete the other response.
- If YES, complete the **Cancelled Activities** table, including:
  - **Canceled activity** - This is the name of the activity from your proposal Work Plan.
  - **Reason for cancellation** - Briefly explain why this activity is being canceled from the grant.
- If NO, remove the **Cancelled Activities** table from the template before submitting your report.



**1.3c) Is there a risk that the program will not end on time as per the grant agreement?**

- Select YES or NO and delete the other response.
- If YES, briefly detail the reasons for this delay and any measures you are taking to get the grant back on track.

**1.4 MAP Data Collection**

- Baseline datasets for Household Surveys and Major Reviews are due at midterm.
  - Endline datasets for Major Reviews, Annual Check-ins, and PIM datasets are due at completion.
  - Datasets should be uploaded separately as a supporting document in Excel format.
  - In the table provided, select YES or NO and delete the other response.
  - If Baseline data was collected, the “Randomly Selected for Household Survey” column must be filled in on the Water Points List.
- 

**2. FINANCIAL PROGRESS**

*charity: water requires partners to closely track underspends, as we would like all funds spent and all underspends reinvested back into the program as early as possible to avoid no-cost extensions.*

**2.1 Changes from Proposal Budget**

**2.1a) Have there been any major changes that affect the budget assumptions submitted in the final approved grant Proposal?**

- Select YES or NO and delete the other response.
  - If YES, briefly explain how you will reinvest these savings or additional funds into the program moving forward.
- 

**3. ADDITIONAL COMMENTS**

If you need to communicate something additional that isn't captured in the template, provide any additional comments in this section.

**IMPORTANT:** The Budget, Work Plan, and Water Points List should reconcile with the information you've presented in the Narrative. Please double-check them against one another before submitting.



PROGRAM  
PROFILE

PROPOSAL

FIRST QUARTER  
REPORT

MIDTERM  
REPORT

**THIRD QUARTER  
REPORT**

COMPLETION  
REPORT

## THIRD QUARTER REPORT GUIDANCE

<b>Grant ID:</b>	The charity: water grant ID
<b>Reporting Dates:</b>	The implementation dates you are reporting on in the third quarter report, in the following format: mm/dd/yy - mm/dd/yy

### 1. PROGRAM PROGRESS

#### 1.1 Key Program Outputs

##### 1.1a) Program Outputs To-Date

- **Water points completed** - Number of water points that have been completed as of this progress report. For the purpose of this report, completed water points and people served are water points that are in use by communities and associated people served. Please note that these can be estimates.
- **People served** - Number of people who have been served by the water points completed as of this progress report. This information is required for all progress reports.
- **Sub-water points to be completed (if applicable)** - Number of sub-water points that have been completed as of this progress report. Refer to your RFP for instructions on which outputs should be provided here. If your RFP does not instruct you to provide additional outputs, remove this row from the table.
- **Sanitation or hygiene outputs (if applicable)** - Number of sanitation and hygiene outputs that have been completed as of this progress report. Refer to your RFP for instructions on which outputs should be provided here. If your RFP does not instruct you to provide additional outputs, remove this row from the table.

#### 1.2 Changes to Outputs

##### 1.2a) Have there been any changes to the Water Points List since the last report?

- Select YES or NO and delete the other response.
- If NO, remove the **Affected or Added Water Points** table from the template before submitting your report.
- Minor project data or Water Points List changes should not be included here. Only respond “YES” and provide details in them **Affected or Added Water Points** table for the following types of changes:
  - Any change in the total number of water points
  - Any change in technology type
  - Any change in location type
  - A decrease in total people to be served by the grant by 20% or more
- Water points affected by the same change should be reported on in aggregate within the same row.



- The table below provides examples of each type of change:

Affected or added water points	Description of change
<b>Example of change in total water points:</b>	
2 new water points	We are able to construct 2 more water points than originally proposed. These new water points will be spring protections in communities.
281.441 - 281.450	Due to increased demand for household filters in other communities, the total number of communities to be served under this grant will be reduced to 440.
<b>Example of change in technology type:</b>	
281.001 - 281.005	These school water points will now also receive latrines and will be reflected as Water Point & Sanitation inventory in the next report
All hand-dug wells	All hand-dug well water points will now be drilled wells
<b>Example of change in location type:</b>	
15 community water points	15 of our proposed community water points have been replaced with 15 school water points.
<b>Example of decrease in population served:</b>	
All water points	Overall people served has decreased from 12,000 at proposal to 8,500 due to lower than anticipated household populations.

### 1.3 Changes to Activities

#### 1.3a) Have there been any notable to the activities in your proposed Work Plan

- Select YES or NO and delete the other response.
- If YES, complete the **Delayed Activities** table, including:
  - **Delayed activity** - This is the name of the activity from your proposal Work Plan.
  - **How will you get back on track?** - Briefly describe how you will accommodate. this delay/adjust your Work Plan to ensure overall grant implementation remains on track.
- If NO, remove the **Delayed Activities** table from the template before submitting your report.

#### 1.3b) Have any activities in your proposed Work Plan been canceled ?

- This refers to activities that will no longer be conducted as part of this grant.
- Select YES or NO and delete the other response.
- If YES, complete the **Cancelled Activities** table, including:
  - **Canceled activity** - This is the name of the activity from your Proposal Work Plan.
  - **Reason for cancellation** - Briefly explain why this activity is being canceled from the grant.
- If NO, remove the **Cancelled Activities** table from the template before submitting your report.



**1.3c) Is there a risk that the program will not end on time as per the grant agreement?**

- Select YES or NO and delete the other response.
  - If YES, briefly detail the reasons for this delay and any measures you are taking to get the grant back on track.
- 

**2. FINANCIAL PROGRESS**

*charity: water requires partners to closely track underspends, as we would like all funds spent and all underspends reinvested back into the program as early as possible to avoid no-cost extensions.*

**2.1 Changes from Proposal Budget**

**2.1a) Have there been any major changes that affect the budget assumptions submitted in the final approved grant Proposal?**

- Select YES or NO and delete the other response.
  - If YES, briefly explain how you will reinvest these savings or additional funds into the program moving forward.
- 

**3. ADDITIONAL COMMENTS**

If you need to communicate something additional that isn't captured in the template, provide any additional comments here.

**IMPORTANT:** The Budget, Work Plan, and Water Points List should reconcile with the information you've presented in the Narrative. Please double-check them against one another before submitting.



PROGRAM  
PROFILE

PROPOSAL

FIRST QUARTER  
REPORT

MIDTERM  
REPORT

THIRD QUARTER  
REPORT

**COMPLETION  
REPORT**

## COMPLETION REPORT GUIDANCE

<b>Grant ID:</b>	The charity: water grant ID
<b>Grant Dates:</b>	The full grant period dates, accounting for any extensions, in the following format: mm/dd/yy - mm/dd/yy, including reporting.

### 1. PROGRAM OUTPUTS

#### 1.1 Status of Outputs

- If there were formally amended changes or updates during the grant period through a Grant Amendment, respond to this question based on the amended outputs.
- Select YES or NO and delete the other response.
- If NO, explain why.

#### 1.2 Completed Outputs

- Complete tables 1.2a-1.2d for all completed outputs of the grant. These outputs should be the same as those provided in *Section 5. Program Outputs* in your Proposal Narrative, unless the grant was formally amended through a Grant Amendment
  - If the grant outputs were amended, use the amended outputs instead.
- For each output, provide the following information:
  - **Proposed** - These numbers should match the numbers from your Proposal Narrative unless the grant was formally amended through a Grant Amendment. If the grant outputs were amended, use the amended output values instead.
  - **Completed** - These numbers should represent the actual achievements of the grant and should match the numbers presented in your completion Budget and Water Points List. Please confirm the accuracy of these output numbers before submitting.
  - **Reason for change** - If the difference between your proposed number of outputs and completed number of outputs is +/- 20%, briefly explain the reason for this variation.
- Include units and add or remove rows from each table as needed.

##### 1.2a) Water Outputs

- **Total daily water users** - The total number of daily water users served at the completion of this grant. We recognize that this number may not capture the distinct beneficiaries for this specific grant. This number is intended to capture the daily water users for individual water points within this grant. This should match the Total Daily Water Users column (column U) on the Water Points List. This output is required from all partners.



- **Unique daily water users** - The unique number of daily water users served at the completion of this grant. This number is intended to mitigate against double-counting by removing beneficiaries served by multiple water points within this grant (e.g. both a community and a school water point) and beneficiaries served by water points under past charity: water grants. This should match the number of Unique Daily Water Users (column W) on the Water Points List. This output is required from all partners.
- **Water points completed** - This is the total number of water points completed by the grant. This output is required from all partners.
- **Sub-water points to be completed** - The number of sub-water points completed in this grant. Refer to your RFP for instructions on which outputs should be provided here. If your RFP does not instruct you to provide additional outputs, remove these rows from the table. These outputs should be the same as those provided in your Proposal Narrative.

#### 1.2b) Sanitation Outputs

- Refer to your RFP for instructions on which outputs should be provided here.
- If your RFP does not instruct you to provide sanitation outputs, remove this table.
- These outputs should be the same as those provided in your Proposal Narrative.

#### 1.2c) Hygiene Outputs

- Refer to your RFP for instructions on which outputs should be provided here.
- If your RFP does not instruct you to provide hygiene outputs, remove this table.
- These outputs should be the same as those provided in your Proposal Narrative.

#### 1.2d) Other Outputs

- Refer to your RFP for instructions on which outputs should be provided here.
- If your RFP does not instruct you to provide additional outputs, remove this table.
- These outputs should be the same as those provided in your Proposal Narrative.

### 1.3 Water Quality Results

- For all new and rehabilitated water points included in this grant, charity: water requires verification that water quality meets minimum requirements prior to handing water points over to the community or institution. Complete tables 1.3a-1.3b for verification.

#### 1.3a) Quantity of Water Points Tested

- **Water Point Type** - The type of water points implemented in the grant (these should correspond to the inventory types used on in your Water Points List (e.g. Well with Handpump, Piped System, Rainwater Harvesting, etc.).
- **Quantity of completed water points** – This is number of water points of each inventory type that were completed within the grant.
- **Quantity of samples tested for water quality** – This is the quantity of samples tested for water quality per inventory type.
- **Explanation for quantity tested** – Provide an explanation for the number of samples tested. For example, in a Piped System, you might only test at the reservoir level and apply these results to all tap stands in the system.
- For example:

Water Point Type	Quantity of completed water points	Quantity of samples tested for water quality	Explanation for quantity tested
Well with Hand Pump	122	122	100% of wells with hand pumps were tested.
Piped System Tap Stand	52	5	These 52 tap stands are part of 5 systems. Each system has one storage tank, for a total of 5 storage tanks. The water was tested from each of the 5 storage tanks.

### 1.3b) Parameters

- Parameter Tested –**
  - Fecal Indicator Bacteria** – Specify E. coli, thermotolerant coliform, fecal coliform, or other
  - Fluoride** – Leave this row in the table for reference, even if not tested, and put N/A in other cells
  - Arsenic** – Leave this row in the table for reference, even if not tested, and put N/A in other cells
- charity: water maximum limit value** – charity: water values have already been provided in this column. Do not edit.
- Were all results within the limit value for this parameter?** - Select YES or NO and delete the other response.
- If NO, how many samples were outside the limit values?** – If NO (all results were not within limit values), indicate quantity of samples that were outside of the limit values. Provide the number, not the percentage.
- If NO, what was the range of sample results outside the limit values?** – If NO (all samples were not within limit values), indicate how far outside the limit values samples were. Provide this as a range – lowest to highest values.
- Example:

Parameter Tested	charity: water maximum limit value (including units)	Were all results within the limit value for this parameter?	If NO, how many samples were outside the limit values?	If NO, what was the range of sample results that were outside of the limit values?
<b>Fecal indicator Bacteria</b> (specify: <i>E.coli</i> , thermotolerant coliform, fecal coliform, or other)	<b>10 CFU/100 mL</b> (or MPN/100 mL)	NO	2	15 – 45 CFU/100 mL
<b>Fluoride</b> (if required per the grant RFP)	<b>1.5 ppm (mg/L)</b>	N/A	N/A	N/A





	<i>(if the National Standard Value differs, change this value here)</i>			
<b>Arsenic</b> (if required per the grant RFP)	<b>10 ppb (µg/L)</b> <i>(if the National Standard Value differs, change this value here)</i>	N/A	N/A	N/A

**1.3c) Actions Taken**

- For each row in the Parameters table above indicating that some samples fell outside the limit values, explain any steps taken as a result.

**2. PROGRAM OUTCOMES**

**2.1 Program Outcome Results & Action**

**2.1a) Description of Outcome Results**

- This relates to your organization's outcome measurements for this program and relates to the indicators in section 5.2e of the Proposal Narrative
- Use this space to provide a narrative account of your outcome results
- Be sure to include the change measured in each of the indicators outlined in the proposal, along with any justification of the results.

**2.1b) Acting on Results**

- Describe any action taken or planned as a result of either these outcome results described above or MAP Framework results.
- Where possible, please highlight how these will be relevant to future charity:

**2.2 MAP Data Collection**

- PIM datasets and endline datasets for Major Reviews, Annual Check-ins, and Household surveys are due at completion.
- Datasets should be uploaded separately as a supporting document in Excel format.
- In the table provided, YES or NO and delete the other response.
- If endline data was collected on communities served in this grant, the column "Randomly Selected for Household Survey" on the Water Points List must be filled in.
- If endline data was collected on a past grant (for the Annual Check-in or Major Review), a list of communities surveyed must be submitted with the following information: Community name, Community ID (assigned by the partner and used in the surveys, usually in the format of 4 letters and 2 numbers, e.g. ABCD01), and charity: water Plaque ID (e.g. 742-33).

**3. PROJECT MONITORING**

**3.1 Project Monitoring Details**

- Briefly fill in the **Project Monitoring** table with the following details:



- **Water technology** - List the technology or technologies here .
- **Location type** - List the location type or types- community, school, or clinic - here.
- For the listed technology types, answer the following questions:
  - *For how long will water points be monitored post-implementation?*
  - *Who will conduct the monitoring (you, the government, etc.)?*
  - *With what frequency?*
  - *If the following issues were found during post-implementation monitoring, describe how each would be resolved after the completion of the water point: repairs to infrastructure, water quality, software/training issues (e.g. water committee re-trainings).*
- If monitoring strategies differ greatly between technologies or location types, you can copy and paste the table as often as needed.

## 4. PROGRAM CHALLENGES

### 4.1 Challenges

- For each challenge experienced during the grant, briefly fill in the **Challenges** table:
- Number each challenge sequentially.
  - **Statement of the challenge** - One sentence stating the challenge faced
  - **Background summary** - Brief summary description of the challenging situation
  - **Explanation of remediation** - Brief explanation of how this challenge was remediated in the current grant
- Challenges may be political, social, environmental and/or implementation-based.
- Example:

4.1	Challenges	
#1	<b>Statement of the challenge:</b>	<b><i>GI pipes were hyper-corroding soon after implementation</i></b>
	Background summary	<i>E.g. - It was found that GI pipes for the India Mark II pump were hyper-corroding in as a little as six months after implementation.</i>
	Explanation of remediation	<i>E.g. - After further research, it was found that groundwater with a pH of 6.5 or lower is hyper-corrosive to GI pipes. The remediation for this is using the pH data to determine which types of pipes to use. Depending on the depth of the borehole, PVC or Stainless Steel pipes are used in order to prevent hyper-corrosion and frequent breakdown.</i>

## 5. LEARNINGS

### 5.1 Program Learnings & Key Implementation Takeaways

- For each learning identified during the grant, briefly fill in the **Program Learnings** table:
  - **Lesson** - One sentence stating the lesson learned
  - **How to mitigate or address in the future** - Brief explanation of how this lesson will be applied to the program moving forward
- Add or remove rows from the table as needed.



## 5.2 Sector-Wide Learnings

- For each sector-wide learning identified during the grant, briefly fill in the **Sector-wide Learnings** table:
  - **Lesson** - One sentence stating the lesson learned
  - **How will this be shared with the sector?** - Brief explanation of how this lesson will be shared with the WASH sector
- Add or remove rows from the table as needed.

## 6. IMPACT STORY

- charity: water uses partner-reported case studies and stories from the field in both our internal and external reporting. Stories that we find particularly impactful include:
  - Stories of significant change, particularly showcasing the impact of clean water on time, income, education, health or opportunity
  - Stories that quantify our work, for example:
    - A clinic that saw a reduction in diarrheal diseases from X to Y after the community received a water point
    - A student that missed X number of school days last year, but has perfect attendance now that the community has clean water
    - A household that used to spend \$X to purchase water, but is able to invest that money in something else now that they have a water point
  - Stories with unique circumstances, for example:
    - An all-female water committee
    - A 15-year old water committee president
- Provide a minimum of one story per grant by completing the **Case Study** table in the template:
  - **Name of main subject** - This will usually be a person, but it could also be a group (e.g. a WASHCo, a drilling team, etc.).
  - **Occupation** - If your story focuses on an individual, provide their occupation.
  - **Description of family** - If your story focuses on an individual, provide details about their family.
    - Are they married?
    - Do they have kids? Sons/daughters? What age are they?
    - Who lives in their household?
  - **Community** - Name of the community where the story subject lives or where the story is based
  - **Water Point ID of water point** - Provide the Water Point ID for water point associated with this subject/story, if applicable.
  - **When was water point completed?** - Provide the month and year in which the water point associated with this subject/story was completed, if applicable.
  - **Case study/story details** - With each story you present, we want to understand the impact of the project on the lives of beneficiaries. Each story will be different, but some tips for getting the right information include:
    - Details matter most: name, location, exact lengths of time, exact costs, cost savings, income, etc.
    - Context matters second-most: If you tell us a family was able to save \$50 last year as a result of their water point, what does that equate to - 3-months of income? School fees for 2 kids? etc.
  - **Informed Consent** – please indicate whether informed consent was obtained by selecting either YES or NO and deleting the other option. If the subject or subjects is under 18, this consent should be given by a parent, guardian or caretaker.



- Provide 1-4 high-resolution photos that represent the story. These photos can be portraits, action shots, context shots, group photos of community members or families, etc. Please be sure to submit at least one photo of the subject of the story
  - Copy/paste the table to provide more than one story.
    - If you provide more than one story, number them sequentially.
    - If possible, please include photos.
- 

## **7. ADDITIONAL COMMENTS**

If you need to communicate something additional that isn't captured in the template, provide any additional comments here.

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