

## Checklist for SIB reports

### Narrative

- Does the narrative report give an update on the progress of the project against the agreed outcomes?
- Are the output figures the same across narrative & excel reports?
- Can we see outputs broken down by gender? For children as well as adults?
- If the project is not meeting either the output or spend targets, or has implementation or sustainability issues, do you mention them here, as well as your strategy of how you will resolve the issue?
- If there is a Vision Centre as part of the report, include the financial planning e.g. income/spend overview per Centre – including staffing.
- Do you mention sustainability? I.e. how the service will continue after the project ends.
- Does the project have any examples of new/innovative/good practice? If so, mention here.
- Has the project implemented any new protocols or systems? If so mention here.
- Are you focussing on customer care? Are you conducting any client/customer/patient exit interviews?
- Has the mid-term review been completed and sent to SIB?
- Has the project conducted any good advocacy activities? If so, mention here.
- Does the narrative contain a Standard Charter Bank volunteer opportunity?
- Does the narrative mention if any SCB staff has visited the project in the last 6 months?
- Have you attached any SCB volunteering photos as JPEGs?

### Case studies

- Is the case study following the guidelines format?
- Is the case study photo attached as a separate J-PEG?

### Finance (NB Using the same appendices as in the reporting guidelines)

- Appendix 2 - Is the budget total the same as the MOU?
- Appendix 2 – Have you added a column to give the total of each row? So we can see the totals per budget line over the life of the project.
- Appendix 2 – Have you used the same budget lines as the MOU budget? Have you added or removed any budget lines? Are you proposing to change a budget line by more than 10% across the life of the project? If so we need an LOV requesting this change.
- Appendix 4 – Have you shown the budget and spend for the ½ year reporting period as well as the cumulative budget and spend to date?
- Appendix 4 – If there has been an under/over spend of 10% on a budget line (6 months or cumulative); please complete the Rationale for Variance column.
- Appendix 5 – Is the cash outflow broken down by ½ year reporting cycles? Does this match with your expenditure report (appendix 4)?
- Appendices 2, 3, 4 & 5 - Are the budget & spend figures the same across all excel sheets. Particularly the budget total for the 6 month reporting period, expenditure for the reporting period and projected budget for the next 6 months.

### Output excel sheets – Appendix 7

- Have you included the output targets and actuals for the 6 month reporting period? Have you made it clear that the time period is 6 months? Have you shown the total outputs achieved?
- Is there a cumulative target and achieved for outputs?
- When reporting the outputs of health care professional training, have you separated them out into ophthalmologists/ optometrists; mid-level/nurses and community staff?
- Have you separated the numbers of cataract operations for children and adults?
- If your outputs achieved are less than 90% of the output targets (either for the 6 month reporting period or cumulative), have you completed the Rationale for Variance column?
- Have you ensured that the output targets and achieved figures are the same in appendix 7 as your narrative report?