

# YEAR END EVALUATION

## TOOLS

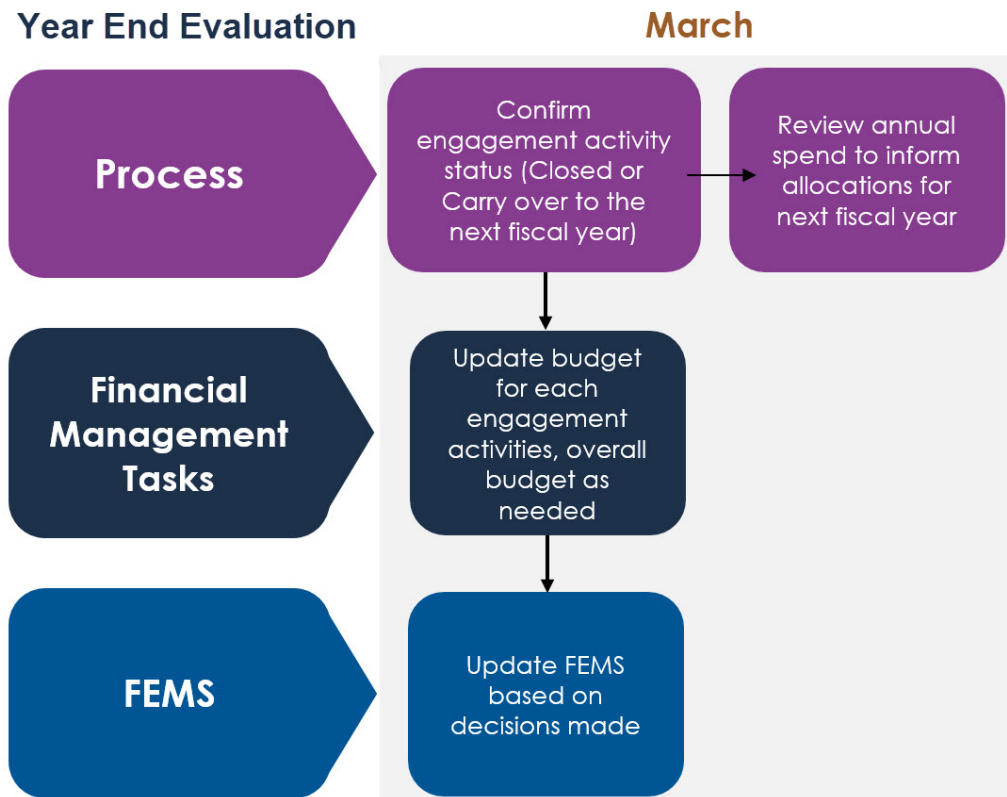
- Evaluation Toolkit
- Site Engagement Activity Tracker (SEAT)
- FEMS Reports and Guides
- Budgeting Tool Template

## ESTIMATED TIMES FOR COMPLETION

- **Timeframe:** March  
For each Engagement Activity, estimate 10-15 minutes.

## DESCRIPTION

This important step will give MSAs a good sense of the previous fiscal year's successes, challenges, and financial status. These items will inform the next year's financial and strategic planning.



## STEPS

### 1. Confirm engagement activity status

Close or carry over. *(Repeat for each engagement activity)*

- i. If an engagement activity is to be closed, finalize it in FEMS, evaluate it and make updates in SEAT. Flag unused funds for reallocation in FEMS.
- ii. If an engagement activity is to be carried over, complete the necessary FEMS steps to finalize this financial year *(see FAQs for options)*. Allocate budget in the new fiscal year. Use carried-over engagement activities to drive the budgeting process for next fiscal year. Don't forget to consider accrual period details in FEMS.

### 2. Review annual spend to inform allocations for next fiscal year

Update budget and analyze the previous year's spend.

Evaluate engagement activities:

- *Which engagement activities are successful and should continue?*
- *Which are not successful and should not be continued?*
- *Is the balance between engagement activity costs, administrative costs, and governance costs (including WG) enabling us to achieve our strategic goals?*

**If No:** What aspects of the budget/engagement activities do we need to change?

**If Yes:** Use last year's results as basis for next year's budget.

**\*\* Planning for Next Fiscal year should take place in tandem with this process.**

## FAQs

### How do I handle engagement activities that span multiple financial years in FEMS?

Sites can choose how to handle these situations:

**Option 1:**

Adjust budget allocation to cover any claims submitted for March 31 and earlier; close engagement activities when all claims have been paid out. Also create a new engagement activities for the new fiscal year and allocate budget.

**Option 2:**

Keep engagement activities open and add new year's allocation to the existing EA.