

## Monitoring and evaluation form

Guidelines for completion of this form are on pages 5 and 6.

If you have any questions please contact the Grants Team on 01245 356018 or email [grants@essexcf.org.uk](mailto:grants@essexcf.org.uk).

Please send an electronic copy to [grants@essexcf.org.uk](mailto:grants@essexcf.org.uk) and a signed paper version with accounts, invoices and receipts to Essex Community Foundation, 121 New London Road, Chelmsford, Essex CM2 0QT

Details of your organisation	
ECF grant ref no	
Name of organisation	
Address	Postcode
Telephone number	
Contact name	
Email address	

  

Details of grant	
Amount of grant	£
Purpose for which grant was made (as per grant offer letter)	
Can you confirm that the whole of the grant was spent on the purpose for which it was given?	YES <input type="checkbox"/> NO <input type="checkbox"/> (please be aware that if the answer is NO, the grant monies may have to be returned)
Have you enclosed copies of accounts, receipts and invoices to support this monitoring form?	YES <input type="checkbox"/> NO <input type="checkbox"/>
If you have answered NO to either question, please explain why	

### Comment and evaluation

**Briefly describe your project's outputs as a result of the grant (actual services provided, activities run, publications produced etc):**

**What have been the outcomes of these outputs (highlight the change, benefits, learning, or effects that happened as a result of the outputs you achieved)**

**Number of beneficiaries supported through this grant/your project:** .....

**Were there any outcomes you were not expecting? (Include here any results that were in addition to your original aims, or difficulties/challenges experienced).**

## Comment and evaluation

**What key lessons can you take from your outcomes to plan or develop for the future?**

**Did you need to raise additional funds for this project?**

**YES/NO**

If Yes, what other funds did you manage to raise and from where? If you plan to, how will you continue this work? (indicate financial or other arrangements made).

**Please add any other relevant information, highlights or comments.**

**Signed**

**Position**

**Date**

**Please return this form along with your accounts, invoices and receipts to:  
Essex Community Foundation, 121 New London Road, Chelmsford, Essex CM2 0QT**

Publicity		
Grant ref no.	Organisation name	
<p><b>COMMENTS</b></p> <p>It would be helpful if you could provide us with a quote we can use on what the grant from Essex Community Foundation has meant to your organisation or to the people that your project/organisation helps in accordance with the outcomes you have reported. (Please keep this to a maximum of 50 words).</p>		
<p>This has been written by:</p> <p>Name ..... Position ..... (Capitals please) (E.g. Committee Member, Client, Helper etc)</p>		
<p><b>PHOTOGRAPHS</b></p> <p>Do you have a photograph that is suitable for inclusion in our Annual Review? <b>YES</b> <b>NO</b> If so please send it via email to <a href="mailto:grants@essexcf.org.uk">grants@essexcf.org.uk</a> with the grant reference no.</p> <p>If NO, would you be agreeable if we were able to arrange for a photographer to visit. <b>YES</b> <b>NO</b> If you are agreeable to a photograph being taken, the following information would be helpful.</p> <p>Does your group meet on a regular day, time and place? If so, please give details:</p>		
<p>If your group does not meet at a regular time, please give the name and telephone number of the person to contact if we can arrange for a photographer to visit.</p>		
Name	Telephone number	

**Please return this form to:**  
**Essex Community Foundation, 121 New London Road, Chelmsford, Essex CM2 0QT**

## Monitoring and evaluation guidelines:

Monitoring and evaluating your funded project is important not just to us and our donors, but also to your organisation for planning and future funding applications. Being organised to monitor progress from the outset will help you evaluate your work and, most importantly, the difference made to your beneficiaries. An outcomes focus will help with your report. Sharing results with your trustees, staff, volunteers and users can be highly motivational.

Please take time to familiarise yourself with this form and the information you will be required to supply – ensure

everyone involved knows what is required and when the form is to be returned.

Think about what is being funded and why. If the grant is for a small project within your organisation you need to report on the outcomes of the project itself, not on those of the organisation as a whole.

Outcomes should be linked to the aims of the project, though some may be unexpected. Use/adapt your existing systems and information whenever possible. Examples could include questionnaires, feedback forms, recorded observation, interviews, attendance sheets, and so on.

### Here are some examples of the type of information we are looking for

#### Example 1

Purpose for which grant was made	Towards refurbishment of the community hall kitchen
Outputs	New cupboard doors installed. New cooker and fridge purchased and installed. Walls painted and safety flooring laid.
Outcomes	Hall bookings increased by 50% Luncheon club for 40 elderly launched, once a week. Toddler group now prepares fresh healthy snacks on the premises for 35 under fours. Youth club now teaches 30 teens simple food prep.
No of beneficiaries	450
Unexpected outcomes	Five of the volunteers who took part in the project have joined the management committee and further improvements to the hall are being planned and funding sought.

#### Example 2

Purpose for which grant was made	To buy IT equipment for a disability help-line support group.
Outputs	Two computers purchased and broadband installed. New marketing material produced. Website designed.
Outcomes	E-mail facility now available in addition to telephone help. (Now averaging 12 e-mails per day). Four new volunteers recruited and IT training took place. Four existing and Four new volunteers gained basic certificates in IT communication skills. Website launched to allow signposting to resources outside help-line hours.
No of beneficiaries	85 per week on average.
Unexpected outcomes	Now working in partnership with a recycling project that installs computers, free of charge, into the homes of people with a disability. Recipients identified through help-line. Client surveys suggests that we are now helping a wider range of disability needs through e-mail / website for those that find telephone a difficult medium, due to hearing or speech difficulties. This will require additional training for the staff and volunteers of the organisation.

**Remember – you have signed a contract (Terms and Conditions) with Essex Community Foundation.**

Non-return of the Monitoring and Evaluation form may result in your organisation being asked to return funds unaccounted for and prevent your organisation from applying for future grants.

Here are some general hints and tips regarding managing and returning monitoring on time for any grant recipient:

- Share and pass on the monitoring requirements and form with others in your organisation
- Diary return dates for Monitoring and Evaluation forms (check with the grants team if unsure)
- If you are unclear about what is expected ASK!
- Put systems and good practices in place to collect quantitative data as a matter of course over the lifetime of the project
- Incorporate required monitoring data into feedback forms completed by your users and volunteers
- Keep copies of all receipts and invoices
- If someone moves on in your organisation, hand the requirements over and inform us of the new contact straight away
- If there are changes to, or problems with a project, talk to the grants team before your monitoring is due – don't assume you can carry the funding over or use it for other purposes
- Regard the exercise as a positive one. Lessons learned from monitoring and evaluation can feed into your future strategic plans and other funding applications
- Allow good time for posting the report and take copies of completed monitoring forms for your files before you send them to us
- Focus on the outcomes (changes/benefits) achieved through your outputs (activity)
- Do not wait to be reminded or chased for monitoring – it may appear unprofessional, and chasing by Essex Community Foundation puts a strain on administrative resources

You can find more hints and tips on our website, or seek help and training through infrastructure organisations such as a CVS, Voluntary Sector Training or resources available through the Charities Evaluation Services (links below).

**Grants/Resources for Recipients**

**NAVCA (to find your nearest CVS)**

**Voluntary Sector Training**

**Charities Evaluation Services**

**Free publication 'Measuring Impact'**

**Outcomes Star**