Funding Toolkit

*Managing, Monitoring and Reporting*

Managing your grant

Managing your grant effectively not only helps you to track the progress, and success of your project, but it also helps you to build stronger relationships with the funder. Gathering the evidence of need and the impact of your outcomes, provides important information and learning to support the growth of your organisation.

You manage your grant by:

- Monitoring activity
- Evaluating your outcomes
- Monitoring spend
- Learning
- Reporting

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Monitoring - why is this important?

- Supports efficient and accurate reporting.
- Helps you to gather evidence for future funding applications.
- Keeps you on track to meet your aims and objectives.
- Enables you to respond to the needs of your community.
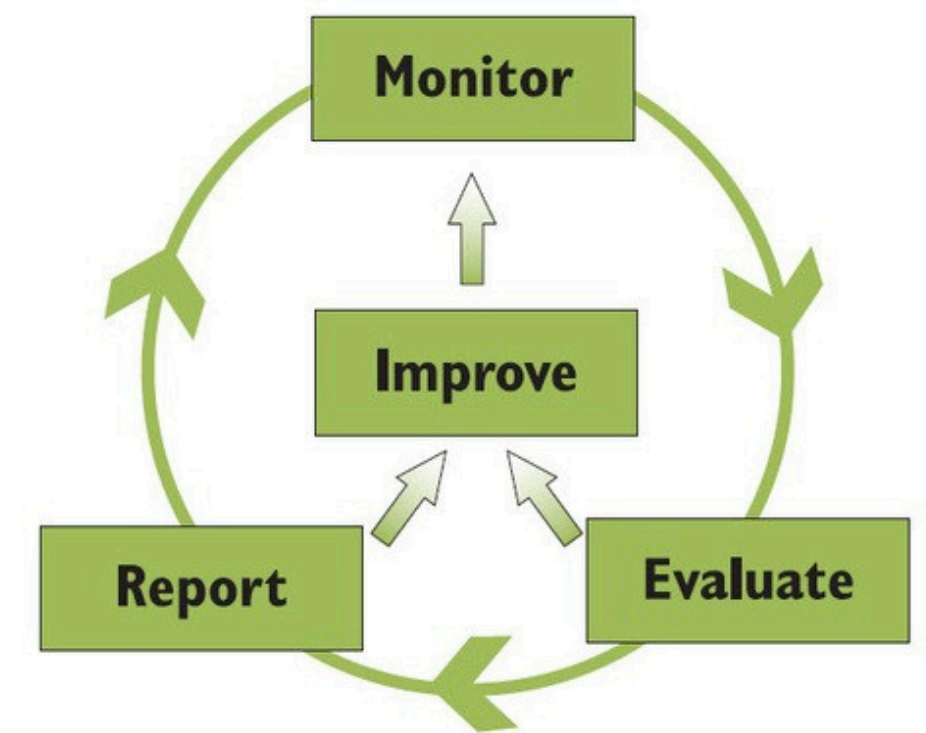
Monitoring - how can it be done?

- Keep basic records of the people using your services - i.e. names and addresses.
- Keep more detailed records of activities - i.e.
  - o how many people came along?
  - o what outcomes did you meet?
  - o what did you learn?
  - o what worked well, and what didn't?
- Take photos and videos - remember to get permission!
- Use Google or Microsoft Forms to gather feedback.
- Ensure those collecting the data understand why it is important.
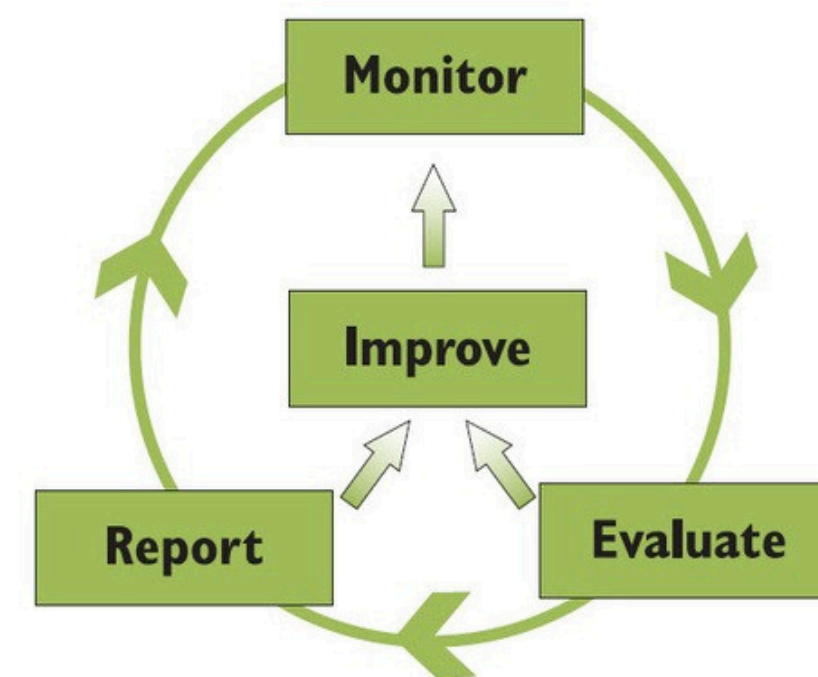
Outcomes

Your funder will want to know that you have achieved the outcomes you set out in your application.

Your outcomes should describe the 'who', 'what' and 'how' of change, for the people you work with.

For example: '80% of young people attending our [*insert your activity/intervention*] will feel more confident'

- 'who' - young people.
- 'what' - you are hoping to change is how confident they feel.
- 'how' - is the direction of change, you hope they will feel 'more' confident

Outputs or Outcomes?

It is important to understand the difference between outputs and outcomes.

- Outputs are easy to measure, they are the number of activities/workshops/groups you have delivered.
- Outputs do not measure changes in behaviour or wellbeing. An example of describing an output would be: 'as a result of the funding received we delivered 8 Mental Health Awareness training sessions'
- Outcomes are the changes that occur as a result of your outputs.
- Outcomes describe the benefits of your outputs for your service users

Outputs or Outcomes?

Outputs vs **Outcomes**

Outputs
- The things we do
- Deliverables, projects, etc, that help us to work towards our goals
- We hope it brings success but doesn't guarantee it
- Might change if it doesn't bring results

Outcomes
- The results I hope to get after doing something
- Measurable results defined as success of the goal
- Shows the success loud and clear!
- Stays the same until achieved

Source: https://static.weekdone.com/wp-content/uploads/outputs-vs-outcomes.png

Monitoring your budget

The budget you provided with your funding application is a guide to how you will spend your money on your project. Monitoring this is important to ensure you spend your grant within the agreed parameters.

It is important to:

- keep track of any underspend / overspend.
- keep track of unexpected costs.
- keep all receipts.
- discuss any changes to your spend with your funder - for example if you have costs you did not expect, or if you have underspent and would like to allocate cost to another budget header.

Reporting

Funders will ask you to provide a report to demonstrate how you have spent your grant. Often reporting requirements are detailed in your grant conditions and acceptance documents.

It is important to:

- keep track reporting **dates** - put these in your calendar and give yourself plenty time to write.
- **check with the funder** to see if they have a proforma or reporting template.
- **gather evidence throughout** the duration project, not just at the end.
- demonstrate how your work has **impacted** your community.
- demonstrate your **successes**.
- demonstrate what you have learned, **not everything goes to plan and that's ok.**

Reporting

The reporting process is an opportunity to assess and evaluate your work. *Reporting helps you to:*

- review your monitoring processes - are they effective? are they creative?
- consult with your staff and volunteers, ensuring they understand the need to gather feedback and evidence.
- ensure you are meeting the aims of your organisation.
- gather case studies.
- learn what works, and where you can improve

Top Tips

- Know when your reports are due - put a note in your diary and report on time.
- Understand how you submit your report - does the funder have a template? do you use a portal/funder website to submit?
- Talk to the funder if you are making any changes in your spend or program.
- Monitor and evaluate throughout - keep accurate records.
- Talk to your staff, volunteers, and service users throughout - is the project meeting their expectations?
- What can you improve?
- Develop a good relationship with your funder - keep them updated and meet your deadlines

Engage Renfrewshire Training

All courses are free to attend:

- **Impact, Outcomes and Reporting - 2 hours**

To express interest:

email - info@engagerenfrewshire.com

or call 0141 887 7707