

ENGAGE
R E N F R E W S H I R E



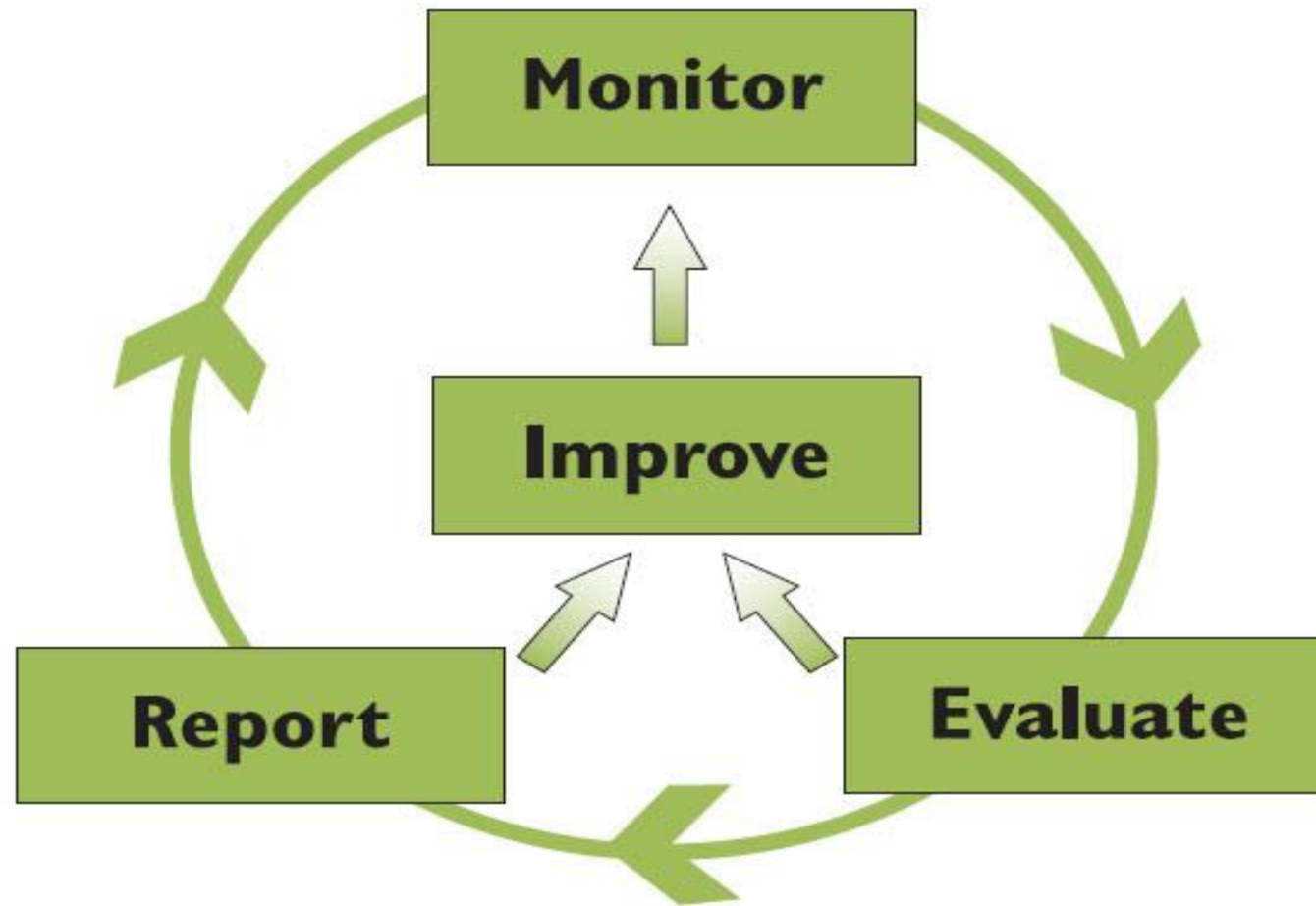
Funding Toolkit

Managing, Monitoring and Reporting

Managing your grant

Now you have been successful in obtaining a grant is it important to manage this as it makes it easier when completing the funders reporting requirements and learn from your delivery. You do this by:

- **Monitoring activity** – are you doing what you said you would do.
- **Keeping track of participants** – are you on track to support the number of people you said you would.
- **Outcomes** – demonstrates that your project is achieving impact.
- **Spend** - Is there any overspend or underspend on any costs.
- **Reporting guidelines and deadlines** – may sure you check any reporting guidelines and keep a diary note of reporting dates so can prepare and submit on time.



Monitoring

- Gives you a written record of who's using your organisation or project and shows the current funder that their money has gone where it was meant to.
- It will also allow you to show future funders who used your organisation or project and what they did.
- Information gathered through monitoring will also be used for assessment to check you are achieving your organisations aims and objectives.
- It is best to decide beforehand what level of monitoring you are able to carry out and set up systems before you start work on your project.
- Systems set up for monitoring should be decided jointly between your management committee and project workers.

Monitoring – how it can be done

- Keep simple records i.e. names and addresses of people who use your organisation, when they joined and when they left.
- Keep more detailed records of what activities they were involved in (photo's, videos publicity materials etc) – ensure you get permission for photo's.
- Find the balance between keeping track of your users and flooding yourself with paperwork.
- Ensure monitoring methods are agreed between your management committee and project workers.

Monitoring the budget

- The budget is a guide to whether you are spending your money as you planned.
- The budget can warn you that you are overspending, under spending or spending money on things you did not expect.
- Keep receipts to keep a record, some funders also require these with reports.
- Discuss any budget revisions with the organisation awarding your grant including underspend and its allocation.

Outcomes

Funders want to know that you have achieved the outcomes you set out to do in your application.

- They should describe the 'who', 'what' and 'how' of change. So for example, if we had an outcome that was 'older people will feel less isolated'.
- 'who' is older people.
- 'what we are hoping to change' is how isolated they feel, and
- 'how' do we hope that will change is the 'less'. So the 'how' refers to the direction of change rather than how will we change it.

A good written outcome for this example is:

20 older people supported by our project feel less isolated through participation/support in (the activity/intervention).

Outputs or Outcomes

- **an output is the physical result of your work.** It's the number of meetings, the number of people served, the number of meals delivered, and the number of trainings your organisation will provide with the grant you're applying for. Outputs do not measure the change in behaviour or knowledge as a result of a grant's activities.
- On the other hand, **outcomes record the changes that occur as a result of your program.** Outcomes are the difference you've made as a result of the outputs: the decrease in hunger, the decrease in disease, the increase in a person's ability to care for themselves, etc.
- Some funder don't ask for outcomes or outputs at all, but the ones that do expect you to know the difference.

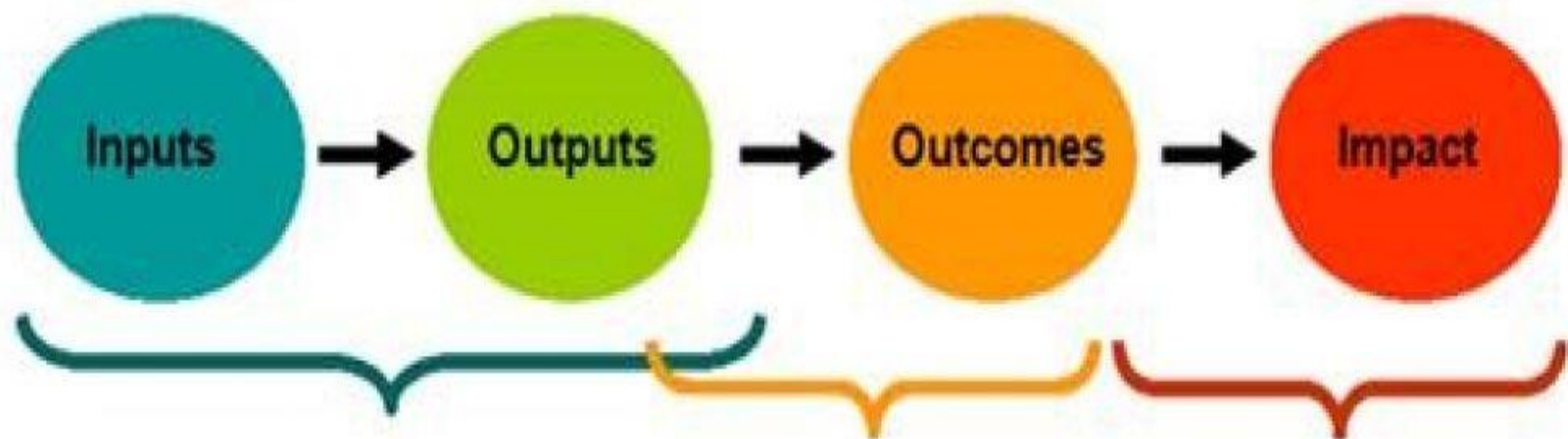
Reporting

- Funders will ask for reports at certain points i.e. annually and at the an end of grant
- Completing a report is about assessing and providing information to the funder based on the the information you have collected from monitoring and demonstrates how well your project or organisation is performing e.g. Is it doing what it set out to do? Is it reaching its target group? What have been the results?
- Assessing your work allows you to learn from your mistakes and celebrate your successes and shows funders that you are keen to evaluate your performance, that you are professional and want to achieve the best results at all times
- Assessment will allow you to identify areas of further work and give you solid evidence for future funders

Reporting

You can carry out assessment to obtain information to complete the report by:

- Using the information from monitoring - ensure you have met the outcomes
- Use interviews or questionnaires to consult workers and people who have benefited from your organisation
- Gather case studies to demonstrate impact
- Doing an honest appraisal of your own performance
- You will then be in a position to complete the report describing how your project worked, what it achieved, how it could be done better next time and areas for future work



Monitoring: What has been invested, done and produced, and how are we supporting partners to achieve the objectives?

Evaluation and review: What progress has the project made towards achieving its objectives?

Impact assessment: What long-term, sustainable changes have occurred and how did our interventions contribute to these?

Tips

Know when the reports are due

- It is not the responsibility of the funder to notify you report due dates. These dates are normally included in your contract or letter of agreement. Have a system of keeping track of reporting requirements, whether it is on a shared calendar or assigned to one person. Find a system that works for your organisation and build it in a way that considers the fact that changes in staff and dates may occur along the way.

Use the reporting forms provided

- Funders often provide templates for reporting and this information and links will be with your contract/letter of agreement or on the funders website or sent directly to you. Use this format, If you are unclear as to what is expected as an answer to any one question, give the funder a call – most of the time, they will be happy to provide clarification.

Tips

Report on time

- It can be quite damaging to your credibility when a funder is forced to chase you for your required reports. There is a reason the reports were scheduled for a specific time. Perhaps the dates were set to correspond with the scheduled release of your next cheque or because the funder needs to collate findings to report internally.
- Remember you want to develop a good relationship with a funder and everything you do during the course of any grant will impact the possibilities for the future. If a funder needs to send frequent reminders of overdue reports or, you will be considered a higher maintenance organisation and that will be in their mind when they review your next application

Engage Renfrewshire Training Courses

All courses are free to attend:

- Impact, Outcomes and Reporting – 2 hours

To express interest email info@engagerenfrewshire.com
or call 0141 887 7707

Additional support

- Sandra Brown –Funding and Organisational Development Officer

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