

## Guidelines for end of grant impact monitoring

These guidelines seek to help our grant applicants understand the monitoring and evidence requirements that you will need to meet when you receive a grant from Heart of Bucks.

Through the systematic gathering of accurate, timely, objective and reliable information you will help us to evaluate the success of our grant-making in meeting local needs and enable us to source more donations in future.

### Why is monitoring important for you?

Working through and understanding the different monitoring categories and measures at the time you make your application can help you to really focus on what you are trying to achieve in the lifetime of your project, and how you will know if it has delivered what you expect it to achieve. This is important not simply so you can report to us; having clear measures of success and a good system of evaluating your impact will help inform your decision makers, the people who work for you and who use your services, and will help in both the promotion of your work and future service planning.

### Why is monitoring important for Heart of Bucks?

As a funding body we have a duty to our funders and donors to ensure their donations are used well and make a real difference to their communities. Your evidence will help us to understand your project better and will enable us to report back to the donors and also to showcase what donated funds can achieve, thus inspiring more donations.

**Gathering evidence to evaluate your project:** During the project life you will need to collect quantitative and qualitative evidence for your project. The best way to achieve this is to be prepared from the planning stage of your project, thinking about who you need to involve and how you will capture the necessary information.

**Quantitative** evidence is essential to show your financial accountability and to demonstrate that you have spent the grant money according to the budget submitted. This can be in many forms, for example:

- Receipts for capital purchases (equipment, assets)
- Invoices for overhead costs (room hire, premises cost)
- Pay slips for staff costs (at least one per quarter for duration of grant funding period)
- Printing costs for publicity material
- Volunteer expenses such as travel tickets, train tickets
- Any costs (above £50) associated with other categories

Whichever way you provide it, it is essential that you can show evidence for ALL the grant monies spent. If you are unsure how to evidence your spending please talk to us so we can agree a way forward with you.

This is not an exclusive list, and there may be many other ways that you can evidence your grant spending. We welcome your feedback!

**Qualitative** evidence can be thought of as telling the story of your project's success. It's less about hard facts and more about the experience of your service users and the results achieved. Here are some examples of qualitative evidence:

- Photos of your activity/new equipment/event
- 'Before and after' photos if your grant was to replace or renovate something
- Videos of any activity
- Case studies
- Quotes and testimonies from your service users or other relevant people
- Any promotional material like leaflets or flyers
- Reports of any health and wellbeing measurements or other measures of progress e.g. Outcome Star, Warwick-Edinburgh Mental Wellbeing Scale (WEMWBS)

### Selecting the right impact theme and outcome categories

We want you to measure something that it is meaningful and relevant to your project, but which is not hugely onerous or which adds lots more work for you. To achieve this, it's important to take the time to select the right themes and categories when completing our grant applications.

You will need to select an impact category\* from the dropdown list in section 3 on the application form. This will prompt you to select a maximum of three outcomes (primary, secondary and tertiary) for your project. These categories will be the success indicators you will report at the end of the project.

**You do not have to pick more than one outcome to measure if they are not relevant to you.**

If your grant application is successful, a monitoring form link will be sent with your grant confirmation message. To make it easier to report at the end of your project you should check the indicators on the monitoring link and make sure you can start collecting the evidence as soon as your project starts.

### Monitoring terms explained

**Impact:** Measurement of the tangible and intangible consequences of some action. It is the longer term effect of a project or an activity on the social fabric of the community and well-being of the individuals and families.

**Outcome:** An immediate change that occurs as a direct result of project indicators or outputs.

**Indicators:** These are measureable data produced by a project.

*\*We strongly advise grant applicants to look through the impact and outcome category list while applying for funding.*