Heart of Bucks
COMMUNITY FOUNDATION FOR BUCKINGHAMSHIRE

Guidelines for evaluation and impact monitoring

Introduction:

These guidelines seek to help our grant applicants understand the evaluation and monitoring of the funded projects. 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. This will also help you to tell your success story better and clearly, of how you are achieving the change you sought from the funded project.

Why is impact monitoring important to you and Heart of Bucks

Good impact reporting 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.

A good impact report can help

- Review your activities and impact against your vision and purpose
- Engage and inspire potential supporters
- Challenge your assumptions and review strategies and future plans
- Identify strengths and weaknesses
- Publicise your success

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.

What is Evaluation?

Evaluation is the process of determining the significance of the project. It involves collecting and analysing information about an activity/project to identify the effectiveness of the programme.

During the project life, you will need to collect quantitative and qualitative data to evaluate your project. The best way to achieve this is to be prepared from the planning stage of your project, identifying your key issues and target audience, thinking about who you need to involve and how you will capture the necessary information.

What is Impact Monitoring for a funded project?

Impact is the differences a project make. Impact monitoring is measuring the changes achieved from the project.

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.

How to evaluate and monitor a project/activity?

Plan:

- Identify clear objectives by reviewing the current situation before a project starts
- Identify your desired impact
- Identify the activities to achieve the short term and long term goals, resources to carry out those activities
- Understand your indicators of measuring impact
- Decide on the data collection methods (Survey, questionnaire, interview, feedback forms or any other ways of data collection)
- Delegate staff/volunteers for data collection

Do:

- Deliver the project/activities
- Collect the data and evidences on regular basis
- Note any challenges or unexpected changes

Assess:

- What outcome have you achieved, compare with the early plan on desired outcome
- Draw conclusions about the overall impact
- What worked well, what needs further improvement
- Is the project sustainable for future,

Review:

- Celebrate your achieved impact and share your impact story with your funders
- Share impact information with your stakeholders/members/wider community
- Use the learning from your findings
- Allocate resources to best effect
- Plan for the exit strategy when funds ends

End of grant report

The end of grant (EOG) report is the final monitoring report of the funded project. Every group who accept funding from Heart of Bucks are contractually obliged to submit an EOG at the end of their project. Failing to do so before the due date, will adversely affect any further funding application from the relevant group.

EOG process of Heart of Bucks follows three stages.

1) Grant offer letter first establishes the requirement of Grant monitoring at the end of funded projects. Groups signs 'Terms and Conditions' which includes group's availability for monitoring visit, monitoring form link and information on relevant spending evidences.

2) One month before the project finish date, group receives monitoring reminder.

3) Once submitted each end of grant report get assessed and scored on following criteria

a. Submission time

b. Financial evidence of grant spending

c. Indicator values and evidences

d. Case study

e. Other qualitative evidences of project

Types of evidences for end of grant monitoring

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, printing cost)
- Pay slips for staff costs (quarterly), invoices along with the costing spreadsheet (available on our website)
- Printing costs for publicity material
- Volunteer expenses such as travel tickets, train tickets
- Any costs (above £250) associated with other category

  Note: Any evidence with bank statement should be highlighted to specify the spending

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)

Suggestions for evaluation and monitoring

1. Be clear about what you are trying to achieve, for whom and why.
2. Identification of objectives should be based on the needs of your beneficiaries.
3. Select the right impact themes and outcome categories when completing our Grant Applications. (Please check Impact and outcome Category list on the funding page of Heart of bucks Website)
4. Check the monitoring expectation from funders. We sent the link with grant offer letter. Start collecting the desired evidence as soon as your project starts.
5. Collect data, which are only relevant for your impact and easy to collect. Consider involving beneficiaries in reviewing the activity (feedback forms).
6. While reporting your impact, include qualitative (numbers) and quantitative (stories/feedback) evidences as they provide context and value of your project.
7. Photos, audio and videos: Please use consent form and ask for consents while recording any activities.
8. Share your success stories as well as challenges while sharing impact with funders and stakeholders.
9. Be honest and open about the differences you are making.
10. Contact us with any changes in the delivery.
11. For further support, please attend a funding surgery or impact workshop.