Investing in Londoners

Monitoring report guidelines

How to complete the online monitoring form

Web browser

The following browsers have been certified compatible with the online reporting software: Internet Explorer 8, 9, 10 & 11; Mozilla Firefox (for PC and Mac); Safari (for PC & Mac); Google Chrome.

Browsers are tested and certified using default settings and should be the latest version available with the latest updates installed.

You should ensure that you have a strong and stable internet connection when accessing the form as any loss in connectivity could result in a loss of data.

Accessing your account

You should use the same account which you originally set up when making your application – please contact the Trust if you are unsure which e-mail address this is registered to or if the person who applied has left and the e-mail address is no longer accessible.

If you have lost or forgotten your password, you can reset this using the button on the login page.

Saving your work

You can save your form and return to work on it at a later time using the "Save and Exit" button at the bottom of each page. Please wait for the page to refresh after clicking this button. You should then receive an automated e-mail containing all of your responses saved to date. Please check this carefully to ensure that your work is successfully saving.

We recommend saving your application regularly whilst you are working on it and not remaining on a single page for longer than 60 minutes as this may cause the form to time out. After saving, you should receive an automated e-mail.

You should also retain a Word copy of any long text responses as a backup as we cannot retrieve any lost work.

Navigating within the form

To move onto the next section, click the "Next page" button at the bottom. You may also move around the sections by clicking on the numbered page titles at the very top of the form.

If you are unable to move to a different page, this may be due to errors with your responses – this will be shown by red text and a warning triangle ⚠ next to the question. You must resolve this issue before moving on.

Do not use your browser's "back" button to navigate as this may cause you to lose your work. When leaving the site please use the exit link/button to leave the portal (not just close the tab/browser)

Completing the questions

Questions on the online form with a ◆ symbol are compulsory and you will not be able to submit the form if these are left blank.

For some questions there is a word limit. The word count is shown below the text box and shows how many full words you have used out of the limit. For long text fields we recommend retaining a back-up in Word, however if you are copying your answers from another source (e.g. web page, PDF or Word document etc.) then please copy the text into Windows Notepad/Macintosh Notes first, then copy from there into the long text field on the form. This is to remove all formatting and special characters, bullet points, tables etc. including any that maybe hidden as this may cause errors.

For financial and other numerical questions please enter **only** numbers and no other text. Do not enter pound signs (£), commas or full stops. For financial questions, please round your answer to the nearest pound and do not enter pence. If the field is marked as required enter '0' where the answer is nil.

For information on how to complete specific questions, click the "i" symbol 🔲 next to the question.

Attachments

We ask for a number of financial documents to be submitted with your form.

To upload documents, select the type of document from the drop down list. Then click on the 'browse' button to locate the file on your system, highlight the file and click the 'upload' button.

Attachments should either be Word Documents (.doc or .docx), Excel Spreadsheets (.xls or .xlsx) or in Adobe Portable Document Format (.pdf). We may not be able to accept documents that are in other formats.

There is a 10MB file size limit on all attachments submitted through the online reporting process. If your attachment is too large to be sent this way and cannot be reduced, please contact the Trust to arrange an alternative means of sending the document(s) Trust at 020 7332 3710 or e-mail citybridgetrust@cityoflondon.gov.uk.

Returning to your application

To log back into your account please use the link in your automated e-mail and on our website which is https://www.grantrequest.com/SID_437/?SA=AM

Reporting on your grant

Glossary:

Evaluation - Using information from monitoring and elsewhere to make judgements on the performance of an organisation or project.

Monitoring – assessing activities in progress to ensure they are on-course and on-schedule to meet output and outcome targets.

Outputs - Products, services or facilities that result from your activities. Outputs can include services you offer, products you sell or give away and facilities you provide.

Outcomes - The changes, benefits, learning or other effects that result from what your project or organisation makes, offers or provides. Outcomes are all the things that happen because of your project's or organisation's services, facilities or products. This includes the bad and not so good, as well as the good; the unexpected as well as the expected. Outcomes can be for individuals, families, or whole communities.

Accountability - The Trust's obligation to account for how grant monies have been spent and the extent to which grants are achieving the Trust's priorities.

City Bridge Trust asks all grantees for a monitoring report to outline how the grant has been used and what difference it has made. For revenue grants we will ask for a report 12 months after your grant start date and for every subsequent year of your grant. For capital grants we will ask for a report 12 months after work has been completed.

Why do we ask for monitoring reports?
There are three main reasons we ask for monitoring reports:

- Learning: Monitoring reports are invaluable in helping the Trust to learn from the grant-making process. The information provided by the organisations we fund helps us to measure the difference our grant-making programmes make. It helps us to understand what kinds of projects have worked well, what has been less successful and what trends or changes are affecting the work of the organisations we fund. This information helps us to shape our grant-making policies and programmes to best meet needs and to encourage good practice.

- Accountability: The Trust is required to be accountable for the grants it makes. When we read your report, we will be checking that the grant has been used for its approved purpose and that the work has met the Trust's funding priorities.

- Good practice: Monitoring will help you understand how your project has performed, what has worked and what has not worked as well. You can use this knowledge to improve existing and future projects so that you can better achieve your objectives.

What are we looking for in monitoring reports?

Grantees often ask us what we are looking for from the information provided in monitoring and evaluation forms. The information below gives a short summary of what we hope to read about in a good monitoring report. The type and level of information will of course vary depending on the size of your grant, type of work and size of your organisation. Your Grants Officer will take this into account when reading your report. For internal purposes, we score all monitoring reports as very good, good, satisfactory or poor. Our scoring guide (on pages 4 & 5) explains how we determine the difference between monitoring reports. Please look at our scoring guide as this will help you to think about how you may be able to strengthen your own monitoring report.

1. **Please describe the activities or outputs you have delivered over the past year of your grant.**
   It should be easy to understand what work has been delivered over the last year with City Bridge Trust funding. Remember, we don't know your organisation as well as you so it can be helpful to explain what exactly different activities involved. What has been delivered should be in-line with your original application and should correspond to the monitoring framework submitted as part of your application - unless changes have been agreed with your Grants Officer. For easy reference we list your original outputs or activities in the monitoring form. We understand that it isn't always possible for all targets to be met, if this is the case please explain the reasons why and any actions you took as a consequence. In this section we also want to understand that you have kept good records of what has been delivered and who has accessed your services. Please include summary statistics including any breakdowns by different types of service user or activity.

2. **Please describe the difference or outcomes the work delivered over the past year of your grant has achieved.** Your report should show not only what activities have been delivered with City Bridge Trust funding (see above), but how these have made a difference. When we talk about outcomes we want to know about changes e.g. how much confidence service users have gained or how much knowledge has increased. Again, for convenience, we include the differences or outcomes you set out in your original application in the monitoring form. Identifying and monitoring the difference your work makes is a crucial component in demonstrating the value of your work. There are a variety of ways to gather outcome data, for example by carrying out staff interviews and a survey with users at the start of your project and again at the end of your project. There is no single 'correct' way to collect and assess the difference your project made - for guidance on a range of approaches see the Charities Evaluation Service http://www.ces-vol.org.uk/tools-and-resources

3. **Case example**: **Please give a specific example of the difference your work has made.**
   Over the past year you will have had many examples of how your project has made a positive difference. We want you to think of a good example that brings your project to life and share it with us by telling us the story of one person or family or group that has benefited (either directly or indirectly) from your project. We want you to paint a vivid picture of the work you have done by describing a real, in-depth, example.

4. **Please give us some examples of feedback from those who have benefited from the work you have delivered.**
   Tell us what your users and wider beneficiaries thought of your work over the past year and how you have used this information to review your activities and any changes you made as a result. As well as your users, please share with us any feedback you have collected from your volunteers, staff and the wider community too.

   Explain to us how you have gathered this feedback – for example - using questionnaires or interviews. Alternatively, your feedback may have been collected informally – for example - from ad-hoc conversations or from a comments book. Tell us if you have collected feedback regularly over the course of the past year or if you collected feedback at a one-off event.

5. **What have you learnt from this piece of work? Please include what was challenging as well as what went well.**
   We want you to use monitoring and evaluation to reflect more widely on how the City Bridge Trust grant has been spent. What have you learnt as part of the process? We want to know what you think worked well and what could have worked better and how you can use this information to improve or make changes to current or future projects.

How else does the Trust monitor grants?
The Trust visits a sample number of organisations it is funding each year. The sample is selected to reflect the range, size of grants made and the geographical location of the organisations concerned. If your organisation is selected, you will receive reasonable notice and guidance on the kinds of questions that you will be asked during the monitoring visit.

If you have any further questions or concerns, please contact your Grants Officer.

Monitoring guidelines

	Poor	Satisfactory	Good	Very Good
Met their Objectives	Project does not address the original aims and objectives or has significantly failed to deliver on them.	Most outputs are on track and activity clearly working towards the project's overall aim. No commentary is given on missed targets.	Outputs are on track or where they are not this is clearly identified with causes and solutions.	Outputs are exceeded or met to a high standard. Where there have been barriers or variation this has provided useful learning and solutions have been identified.
Quality of monitoring statistics	No statistics provided or simply a record of the number of activities held in a format that is hard to follow.	Basic statistics provided in a structured and consistent manner i.e. tables of activities run and beneficiary numbers.	Good summary statistics of project activities and basic statistical interpretations. Some breakdown by type of beneficiary and/or type of activity e.g. casework data. Indirect beneficiaries may also be included.	Statistics are provided clearly and interpreted within the text. Baseline data is used to measure change and statistics go beyond basic activity monitoring to demonstrate outcomes. Data is used to adapt and improve the project.
Quality of user feed-back	No or very limited user feedback is provided and no comments on individual users.	Quotes gathered informally from users are included and/or staff provide pen portraits of individual service users and how they have engaged with the project.	Feedback from users or other appropriate persons is gathered in a consistent manner and reported back. More detailed case examples of individual service users may be included.	User feedback is a key part of the monitoring report. The impact the project has made on users is shown through their feedback or from other appropriate persons – and is used to inform the project delivery.
Impact of the work	The project has limited impact due to significant delivery problems – or it is hard to know what impact it has had as the report talks only of outputs and	The project is having a positive impact which can be seen through anecdotal staff accounts of the difference the project has made. Some ad	The positive impact of the project is demonstrated through formal mechanisms set up to gather evidence of the difference the project makes from users, staff and volunteers and this	The project has a strong positive impact and the difference it makes is at the heart of the work and demonstrated in the report. Formal mechanisms allow measurement of

	does not indicate the difference the project has made.	hoc feedback from users may also be provided.	is interpreted clearly in the report. Unexpected outcomes may be identified.	outcomes and staff are reflective of what worked well, including unexpected outcomes, and what could be improved.
Trust's outcomes	From the report it is hard to tell if the project is delivering work that meets the Trust's outcomes / or there have been significant delivery problems or drift from the proposed activity.	The report shows achievement of some outputs and /or outcomes that broadly meet the Trust's outcomes.	The report shows good progress towards outputs and outcomes that meet the Trust's outcomes. It refers to the Trusts outcomes in the presentation of evidence.	The report shows high achievement of outputs and outcomes that contribute towards the Trust's outcomes. The presentation of evidence clearly links to the Trust's outcomes.

Carbon Footprint

Poor	There is little evidence that the organisation has thought about and is doing very little
Satisfactory	The organisation is observing conventional norms, trying not to be wasteful, printing double-sided, etc.
Good	The organisation has taken steps to improve – e.g. it has undertaken an audit or review, it not only has an environmental policy but has taken steps to implement it. It may yet be faced with constraints such as unaffordability of further improvements.
Very Good	The organisation has taken steps to promote environmental excellence throughout its activities and is raising awareness with users. It has understood the links between its own mission and environmental context, and is actively working towards a low-carbon economy.