



## Bridging Divides and Investing in Londoners

### Covid-19 interim impact and learning report guidelines

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#### What changes have we made to grant impact and learning processes during COVID-19?

- We are committed to working with funded organisations at this time and have joined the [Better Reporting initiative](#).
- We have simplified our impact and learning report template to reduce the time and information needed to complete the form.
- This means the form you receive will look different from the form you have completed before or from the example you received when you were awarded your grant. The intention is to make the form quicker and easier to complete – we aren't asking for any new information except about Covid-19. If for any reason you would prefer to complete the original form (e.g. you have already been preparing for this) please let us know and we can issue this instead.

- We have included a section on Covid-19 in our impact and learning report to help flag any particular needs to us.
- We will aim to respond to all mid-grant monitoring reports within 2 weeks but may take longer to respond to final reports where no further payments are due.
- For end of grant reports we have extended the final report deadline to 6 months after the grant has completed unless you are submitting applying for a continuation grant. If you are applying for a continuation grant we will need your impact and learning report before we are able to award new funding.
- For all mid grant reports you do not need to inform us if the report will be submitted up to 3 weeks later than the original due date (though please just let us know if it will be later than this).
- We have also produced an FAQs document on our website: [Covid-19 FAQ](#)
- **We are committed to being flexible. If any funded organisation feels unable to complete the form they can contact their Funding Manager to discuss their situation and work out the best way we can work with them and whether any further information is required.**

**Our commitment:** We will continue to read everything you submit and will learn from it to shape our work across London and to understand how we can best work with and support the organisations we fund.

## Technical details: how to complete the online impact and learning 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.
- A strong and stable internet connection will help make sure you don't lose any data through loss of connectivity.

### Accessing your account

- You will receive an email 2 months before your impact and learning report is due. To login to your online account, use the link in this email or visit the [CBT monitoring and application portal](#) and use the same login details from when you submitted your grant application to the Trust.
- If the person who submitted the form has left, you are not sure what the username is or you want to change it to another member of staff please contact: [citybridgetrust@cityoflondon.gov.uk](mailto:citybridgetrust@cityoflondon.gov.uk)
- If you have lost or forgotten your password, you can reset this using the button on the login page.

## Saving your work

- Please regularly save your impact and learning report whilst you are working on it.
- To save your form use 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 your responses saved to date. Please check this carefully to ensure that your work is successfully saving.
- For long text fields we recommend keeping a back-up in Word. If you are copying your answers from another source (e.g. web page, PDF or Word document etc.) 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.
- We recommend not remaining on a single page for longer than 60 minutes as this may cause the form to time out.

## 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. To move on you will need to resolve the issue.
- 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. We have kept these to a minimum and where possible have auto populated information from data you have already submitted.
- We have removed all fixed word limits to make the form as easy to complete as possible but have tried to give an idea of the length we are expecting.
- 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 several 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](mailto:citybridgetrust@cityoflondon.gov.uk).

## Reporting on your grant

City Bridge Trust asks all funded organisations for a progress report at the end of each year of funding to outline how the grant has been used, what has been learnt and the difference the grant has made. We read everything funded organisations submit and learn from it to shape our work across London and to understand how we can best work with and support the organisations we fund.

- 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 impact and learning reports?

There are three main reasons we ask for impact and learning reports:

- **Learning:** Impact and learning 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. We also hope to use the interim Covid-19 impact and learning reports as a way of understanding the impact of Covid-19 on your grant, your organisation and London's communities.
- **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:** We hope you can use this as an opportunity to reflect on how your project has performed, what has worked and what has not worked as well. This knowledge can enable you to improve existing and future projects so that you can better achieve your objectives.

## **What are we looking for in monitoring reports?**

- We are often asked what we are looking for from the information provided in impact and learning reports. The information we are looking for in the shortened Covid-19 interim reports will be slightly different. We still want to know about the work you have delivered, the difference it has made and what you have learnt. But we are asking fewer questions to make it quicker and easier to complete. Please remember that if you are unable to complete the form or answer all the questions please email your Funding Manager directly so we can work out how we can best support you.
- Our Funding Managers are highly experienced and understand that the type and level of information you provide will also vary depending on the size of your grant, type of work and size of your organisation. They will take this into account when reading your report.

## **What information do we ask for?**

Here is some further information on the type of information we ask for in the form. For information on how to complete specific questions, click the “i” symbol  next to the question on the online form.

### **Describe the work you have delivered with City Bridge Trust funding over the past year of your grant and the difference it has made.**

- This is the key question on the form. We want to understand what work has been delivered over the last year with City Bridge Trust funding (e.g. services, events, products etc) and the difference it has made (you might find it helpful to refer to the monitoring framework you submitted with your original grant application).
- We know you may not be able to access as much information as usual, or speak to as many people, so we haven't asked for specific evidence about how you know the work you have delivered has made a difference (e.g. case studies, survey results or quotes). However, if you want to share this please do.
- Remember, we don't know your organisation as well as you so it can be helpful to explain what exactly different activities involved.
- It is likely that many organisations will need to vary their work in response to Covid-19. Please contact your Funding Manager and/or include details in the Covid-19 section of the impact and learning form. We are committed to being flexible to support you and the communities you work with.

### **What is the one key thing you have learnt from doing this work?**

- We hope that completing this form give you an opportunity to reflect on your grant and share learning. We are interested in hearing about things that worked well, things that failed or things you'd do differently. This might be to do with any element of the work e.g. delivery methods, whether you've empowered service users, diversity of communities you've reached, partnership working etc. This will help us understand the development of your work and build our knowledge so we can apply learning to our wider grant-making.

## Organisational changes and Covid-19

- We have included a section on Covid-19. This will help us understand the impact of Covid-19 on your organisation as well as to understand the wider impact across our funded organisations. However, as highlighted, if you have already discussed this information with your Funding Manager or have similar information in a document you can upload you do not need to repeat the details here.

## Financial information

- As part of your impact and learning report submission we ask for various financial documents. We realise that your financial planning will have been disrupted by Covid-19. Please share what you can with us – we use it to understand your organisation's current financial position.

## How are we doing?

- City Bridge Trust aspires to be a learning organisation and to work alongside the organisations we fund. To help us with this we would really like your feedback about how well we're doing. We understand if you don't have time. But if you do filling in this section of the form and/or leaving an anonymous public review at: [GrantAdvisor UK](#) would really help us. Thank you!

## How do I report on a core cost conversion grant?

If you agreed with your Funding Manager to convert a proportion of your current grant from specific project funding to core cost funding:

- We will email and ask you to complete the standard Covid-19 interim impact and learning report 2 months before your report is due.
- Your core cost funding conversion is likely to only make up part of your grant year. We don't need 2 separate impact and learning reports. Please discuss your core cost funding and original grant award within the same report.
- We recognise that you might need to answer some of the questions differently for your core cost conversion than you would for your original project cost funding award. Here are some ideas on what you might want to think about. However, these are just suggestions. We don't expect you to cover all the points below – please just use what is useful for your organisation.

## Describe the work delivered and difference made

- We're really interested in the difference core cost funding has made to your organisation and the work you do to support Londoners – so try and focus on this rather than the details of how funds were spent. For example, perhaps core cost funding gave you space to try out new approaches, gave your CEO the time to focus on strategy, or simply helped keep your organisation running in difficult times. If your core cost funding made a significant difference across your organisation's work it might make sense to talk about the key workstreams your organisation has delivered over this period.

- We are not expecting you to develop new complex or additional monitoring processes for your core cost funding conversion. Staff or Board reflections could be really valuable and insightful – you may well be able to use information you would have submitted to your Board anyway.

**What one thing have you learnt?**

- You may have received core cost funding from other funders previously or this may be a new experience. Did you learn anything new from this? Did your relationship with CBT continue as normal or feel different in this period?
- If you had discussions with your Funding Manager about whether or not to take up the core offer you may find it helpful to reflect back on these and consider what if anything has now changed.

If you have any questions please speak to your Funding Manager.