

# Monitoring and Evaluation Form Stepping Stones Fund Mid-project

## Grant summary

### Organisation details

Grant Reference:

Organisation Name:

Address:

Name and position of person completing form: Contact email

Telephone

Have there been and changes to these details or other significant changes in your organisation since the grant was made or over the past year?

If yes, please give more details:

**Please make sure that you inform the Trust of any major changes as soon as they occur.**

### Grant details

Purpose of grant:

Period of grant award:

to

Stepping Stones Fund strand you applied under:

If your grant includes staffing costs, please confirm the name of the postholder(s) and their start date

With your Stepping Stones funding you said you would deliver the following activities or outputs:

With your Stepping Stones funding you said you would deliver the following differences or outcomes:

Please give details of any substantial changes to the grant details described above that City Bridge Trust has approved?

### **Project report**

Please describe the activities or outputs you have delivered over the past year of your grant.

Please describe the differences or outcomes the work you have delivered over the past year of your grant has achieved.

Case example: please give a specific example of the difference your work has made.

If available, please give us some examples of feedback from those who have benefited from the work you have delivered.

How has this project help improve your capacity and readiness for social investment?

What have you learnt from this piece of work so far?

Things don't always go as expected. What did not work as well as you hoped it would, why, and what action have you taken?

If your work funded by Stepping Stones Fund is featured on any website, through social media or has appeared in the local or national press please provide us with the link:

What key activities do you have planned for your Stepping Stones-funded project over the coming months?

### **Wider impact of grant**

In the next 12 months, what (if any) non-financial support would help strengthen your organisation? Where possible we'll aim to help you find this.

Has this grant had an effect on your other fundraising results?

Please give details of any specific effects:

How have you found your dealings with City Bridge Trust and UBS?

Please provide any comments you have about your dealings with the Trust and UBS including any problems you may have encountered - your comments can help us improve our practice:

### **Grant spend**

**Please complete the following financial breakdown for the project or activity that was funded by the Trust. This should refer only to the year covered by this report. Where possible try to use the same expenditure headings as were used in your application.**

### Capital Expenditure

Description

£

Total Capital Costs:

### Revenue Expenditure

Description

Salaries -----

-

£

Sessional workers / wages / expenses -----

-

Contribution to core costs -----

-

Direct activity costs -----

-

Other (please specify)

Total Revenue Costs:

Total grant spent:      Total grant awarded:

Unspent Grant:

If you have any unspent grant please explain why this is the case.

**If you would like to use any unspent grant monies please give details of how and when you would like to use them. This will need to be approved by the Trust and you must wait for the Trust's decision before committing the funds.**

### Declaration

**I confirm that, to the best of my knowledge, all the information I have provided in this application form is correct. I fully understand that City Bridge Trust has zero tolerance towards fraud and will seek to prosecute and recover funds in every instance. I request release of the next instalment of our grant and understand that there may be a delay if information submitted is incomplete or if there is an underspend on previous year's award.**

Please tick:      Name:

No

Position:

### How your information will be used by City Bridge Trust

City Bridge Trust (which is administered as part of the Bridge House Estates by the City of London Corporation) uses all reasonable endeavours to comply with the Data Protection Act 2018, which integrates the General Data Protection Regulations. The

Trust obtains and uses information, including personal data, as part of the process of assessing grant applications and monitoring the use of grants. In addition, the City Bridge Trust may share this information with third parties, including other funders, its external consultants and external auditors, police and regulatory bodies for the purpose of determining, preventing or detecting crime; or ensuring that no organisation is receiving duplicate funding; or the validation of contracts; or where this is otherwise required by law. Our privacy and data protection statement can be found here: [www.citybridgetrust.org.uk/privacy/](http://www.citybridgetrust.org.uk/privacy/)

**I confirm that I give my explicit consent for City Bridge Trust to use data relating to my organisation's application as set out above.**

Please tick:      Name:

No

Position:

**Our contact details for enquiries about how we process your information are:**

The Chief Grants Officer, City Bridge Trust, City of London, PO Box 270, Guildhall, London EC2P 2EJ. \* Telephone: 020 7332 3710 \* Email: [citybridgetrust@cityoflondon.gov.uk](mailto:citybridgetrust@cityoflondon.gov.uk)

#### **Concerns over fraud and corruption**

Should you, at any time, have concerns of fraud and corruption within your organisation relating to the grant, then please raise your concerns with us using our Whistle Blowing facilities. You may use our Audit team's 24 hour answer phone number, 020 7332 3663, to report the details or email [raiseyourconcern@cityoflondon.gov.uk](mailto:raiseyourconcern@cityoflondon.gov.uk)