

Project monitoring form

(End of year)



What's this form for?

- **Use this form to** describe what you've achieved through your project. By your project we mean the activities, services or facilities we are funding, as described in our original offer letter, together with any changes we've agreed with you since then.
- **Don't use this form to** inform us about changes to your contact, organisation, bank account or project details. We expect you to discuss these changes with us before they happen and submit the relevant forms, which you can get from your funding officer.

How to fill in this form

- Make sure you've saved this form to your own computer and are using Adobe Reader version 10.0 or above.
- You need to answer all the questions marked with an asterisk*. When you've finished, select Check my form is complete at the bottom of the page.
- Send your form to your funding officer

Form reference

Project ID

Organisation name

Project name

Project year

Reporting period

Part one – Looking back

1.1 What progress have you made?*

Describe the main activities you’ve started, continued or finished during this reporting period.
You can write up to 2,000 characters (about 300 words).

Character count:

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1.2 How much change has happened?*

Explain how much progress you've made towards achieving your project outcomes. You can write up to 300 characters in each box (about 50 words).

Your project outcome		
Change indicators	By when?	How much change has happened so far?*
If you've achieved more or less change than you planned, explain why you think this is.		

1.2 How much change has happened?*

Explain how much progress you've made towards achieving your project outcomes. You can write up to 300 characters in each box (about 50 words).

Your project outcome		
Change indicators	By when?	How much change has happened so far?*
If you've achieved more or less change than you planned, explain why you think this is.		

1.2 How much change has happened?*

Explain how much progress you've made towards achieving your project outcomes. You can write up to 300 characters in each box (about 50 words).

Your project outcome		
Change indicators	By when?	How much change has happened so far?*
If you've achieved more or less change than you planned, explain why you think this is.		

1.3 What have you learned? *

Give details of:

- any achievements or unexpected outcomes you'd like to share with us
- any problems you've faced and how you've tackled them
- how you'll use or share what you've learned from your own monitoring or evaluation
- any changes you'll make to your project because of what you've learned.

You can write up to 2,000 characters (about 300 words).

SAMPLE

Character count:

Give a breakdown of your expenditure for this reporting period. Don't include any VAT you can recover from HM Revenue and Customs. Only enter whole numbers:

Total					
Total					

Explain any significant differences between the amounts you’ve received and spent and how this may affect your project. If you’re not sure whether the difference is significant please discuss this with your funding officer before you return the form to us.

You can write up to 2,000 characters (about 300 words).

Character count:

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Part two – Equality information

2.1 Who has benefited from your project?*

For each category give the percentage of people who have benefited from your project during this reporting period. You should only give details of the direct beneficiaries (the people who use the project), rather than any indirect beneficiaries (for example, their family).

The total for each table should always be 100 per cent.

Ethnic background	Percentage (%)
White	
English/Scottish/Welsh/ Northern Irish/UK	
Irish	
Gypsy or Irish Traveller	
Any other white background	
Mixed / Multiple ethnic groups	
Mixed ethnic background	
Asian / Asian UK	
Indian	
Pakistani	
Bangladeshi	
Chinese	
Any other Asian background	
Black/African/Caribbean/Black UK	
African	
Caribbean	
Any other Black/African/ Caribbean	
Other ethnic group	
Arab	
Any other	
Total	

Gender	Percentage (%)
Male	
Female	
Total	

Age	Percentage (%)
0 - 24 years	
25 - 64 years	
65 + years	
Total	

Disability	Percentage (%)
Disabled	
Not disabled	
Total	

Religion or belief	Percentage (%)
No religion	
Christian	
Buddhist	
Hindu	
Jewish	
Muslim	
Sikh	
Other religion	
Total	

Sexual orientation	Percentage (%)
Heterosexual	
Lesbians, gay men or bisexual people	
Total	

Only complete the following table if your project is delivered in Wales:

Welsh language	Percentage (%)
People who speak Welsh	
People who do not speak Welsh	
Total	

Only complete the following table if your project is delivered in Northern Ireland:

Community background	Percentage (%)
Protestant	
Catholic	
Other	
Total	

Only complete the following table if we asked for this information in your application form. If you are unsure whether to complete this table contact your funding officer:

Detailed age breakdown	Percentage (%)
0 – 4 years	
5 – 9 years	
10 – 14 years	
15 – 19 years	
20 – 24 years	
25 – 34 years	
35 – 44 years	
45 – 54 years	
55 – 64 years	
65 – 74 years	
75 – 84 years	
85 + years	
Total	

2.2 How have you arrived at these percentages?*

Explain what your percentages are based on, for example, data you routinely collect, surveys or monitoring forms.

You can write up to 750 characters (about 100 words).

Character count:

2.3 How well did you reach everyone who could benefit from your project?*

Describe what you've done to make sure everyone who could benefit from your project knew about it and was able to get involved. If your project hasn't been as effective as you would have liked, explain what you'll do differently in the future.

You can write up to 2,000 characters (about 300 words).

Character count:

Part three – Looking ahead

3.1 How prepared are you for the next reporting period, from dd/mm/yyyy to dd/mm/yyyy?*

Use this traffic light system to help us get a sense of how well prepared you think you are for the challenges ahead.

Please be open about sharing any concerns with us. We're more likely to be able to help and support your project to reach a successful conclusion if you let us know about any problems early on.



Everything's on track and you don't expect any problems.



A problem may arise but you're confident you can handle it.



A problem is likely to arise that could seriously affect your project.



Your ability to deliver your planned project activities.*



Your ability to secure other funding you need for this project.*



Your ability to control project costs.*



Your ability to get or retain the staff or other resources you need for this project.*



Your ability to achieve your project outcomes and indicators.*



Your organisation's ability to remain financially healthy.*



A change to your organisation's legal status or governance.*



External factors, including changes in legislation.*



Your ability to deliver your equalities plans for this project.*



A potential change in the need for the project.*

Please explain what the problem is, how you're planning to manage it and if there are any ways you think we may be able to help.*

You can write up to 1,000 characters (about 150 words).

Character count:

If you'd like to provide more information on anything you've rated Amber or there's anything else you think we should know about, please give more details here.

You can write up to 1,000 characters (about 150 words).

Character count:

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SAMPLE

3.2 How much do you plan to spend and how much will you receive from BIG?*

Please update your budget for the next reporting period. Don't include any VAT you'll be able to recover from HM Revenue and Customs. Only enter whole numbers.

Revenue	Total costs £		Amount from BIG £		
Revenue total					
Overheads					
Overheads total					
Capital					
Capital total					
Final total					

3.3 Have you secured any other funding you need?

If some of the money for your project will come from other sources, confirm where it will come from and whether you've secured it yet (leave this question blank if we are funding the entire project). You can add up to nine more rows using the Add row button.

Funding source	Amount (£)	Secured? Please indicate Yes / No
		Yes / No
		Yes / No
		Yes / No
		Yes / No
		Yes / No
		Yes / No
		Yes / No
		Yes / No
		Yes / No
Total		

SAMPLE

3.4 What will you be doing during this period towards making sure the benefits of your project have a lasting impact after funding from BIG ends?

We would like you to think about this throughout your project but we'll expect your plans to become more detailed as you approach the final year.

You can write up to 2,000 characters (about 300 words).

Character count:

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Part four – Declaration

Check the box to confirm that:

- the information in this report is accurate and true and has been approved by the governing body of your organisation
- the money from BIG has been used exclusively for the project described in your original application, together with any changes you've agreed with us since then
- there haven't been any significant changes to your project or the governance of your organisation apart from any you've told us about and we've agreed to in writing
- you've told us about all other sources of funding for your project and you haven't received any duplicate funding for the activities, services or facilities BIG is paying for
- you have sought to achieve value for money for your project by securing goods and services at reasonable prices
- your organisation keeps full and proper accounts and records, including invoices and receipts, which show how the money from BIG has been used
- your organisation has an equal opportunities policy and, if working with children, young people or vulnerable adults, a safeguarding policy; these policies are carried out and regularly reviewed to ensure they adhere to current legislation and regulations
- your organisation hasn't disposed of any BIG funded assets without getting permission from us in writing
- your organisation is following all current statutory requirements and other laws and regulations relating to the project and its work including: adherence to employers' liability insurance; the national minimum wage; the working time directive; health and safety; safeguarding of children, young people and vulnerable adults; data protection and intellectual property rights legislation.

☐

I agree*

Attachments

Please attach:

- examples of how you've acknowledged Big Lottery Fund support in your publicity
- copies of letters confirming any other funding you've secured for your project since your last monitoring report
- anything we've asked you to send us as part of our monitoring for this programme.

Please don't attach other files (particularly pictures). Instead, send anything else you'd like us to see by email or post directly to your funding officer.

You can attach files up to a total of 8MB