



Vision Fund Project Monitoring and Evaluation Handbook

Congratulations on your Vision Fund award! We are delighted to be supporting your activity.

1. Introduction

Before the funded work starts, we'll meet with you to review the Project Plan you provided in your application form and to discuss and agree the monitoring and evaluation process, any support you may need, publicity guidance/requirements and so on.

As you know, you'll need to let us have regular updates about project delivery, both during and at the end of the funding period. All these will be based on the Project Plan you have already provided. For larger projects, we may also ask for a final legacy report 6 months after the funded work is complete.

We understand that things change and don't always go to plan. Sometimes they are better than you could ever have dreamed, and sometimes they go completely pear shaped! Don't worry. There is useful learning no matter what.

2. Reporting

Projects supported by the Community Fund vary widely. Some will be funded over many years, with revenue funding payments made throughout the project period - others may just need one capital grant payment. Reporting requirements will be tailored accordingly. Whatever the arrangements, *all* funding recipients need to tell us how the money has been spent, and crucially, what difference the work supported has made.

This is what we'll ask you for:

a. Projects where funding is paid in full at the outset:

| | What's Needed | When |
|----|----------------------------------------------------------|---------------------------------------------------------------------------------------|
| 1. | Project Plan (included in application form) Doc A | Reviewed & agreed before payment made |
| 2. | Interim Progress & Spend Updates Doc C | Quarterly in Year 1 |
| 3. | Annual Report form Doc D | On the anniversary of your grant award |
| 4. | Completion Report form Doc E | To be agreed with you at project outset. |
| 5. | Legacy Report Form Doc F | 12 months after the funded work is complete. To be agreed with you at project outset. |

b. Projects running for more than one year

| | What's Needed | When |
|----|---------------------------------------------------------------|---------------------------------------------------------------------------------------|
| 1. | Project Plan (included in application form) Template A | Reviewed & agreed before payment made |
| 2. | Grant Spend and Claim Profile Template B | At the outset, reviewed annually |
| 3. | Interim Update Form Template C | Whenever you make a grant claim |
| 4. | Claim Form Template D | Whenever you make a grant claim |
| 5. | Annual Report form Guidance E | On each anniversary of your grant award |
| 6. | Completion Report form Guidance F | At the end of your project, when the funded activities have ended. |
| 7. | Legacy Report Form Guidance G | 12 months after the funded work is complete. To be agreed with you at project outset. |

3. Reporting Templates & Guidance

A. Project Plan

This is based on the outline Plan you provided in your application form. We will ask you to review it and include further detail if an offer of funding is made.

| | Overall Project/Activity Aim(s) (from Q2.3) | Delivery Activities (from Q2.6) What are the main things the project will do/provide? | Outputs (from Q2.7) <i>Outputs: measures of your delivery activities – e.g. number of events held, number of people supported etc.</i> | Outcomes (from Q2.7) <i>Outcomes: what happens as a result of those outputs (i.e. activities), short-term & long-term</i> |
|----|----------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. | <i>e.g. To increase the health and wellbeing of children, young people and adults in Llanaber.</i> | <i>e.g. Provision of a range of exercise and wellbeing activities for all abilities and ages.</i> | <i>e.g. XX people taking part in these activities each year:</i> <ul style="list-style-type: none"> - Pre and after school Play Sessions - 250 per year - Holiday Play Sessions - 84 per year - Relaxation Sessions - 30 per year | <i>e.g. People are:</i> <ul style="list-style-type: none"> - regularly taking part in activities. - reporting improved wellbeing - growing numbers of participants across age groups |

| | | | | |
|----|------------------------------------------------------------------------|-------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|
| 2. | <i>e.g. To develop and market a successful manufacturing business.</i> | <i>e.g. New business established providing full-time employment for at least 3 people</i> | <ul style="list-style-type: none"> - <i>Installation of an equipped workshop space</i> - <i>Recruitment & training of 3 members of staff</i> - <i>Marketing plan developed and being delivered</i> - <i>At least 10 new stockists</i> - <i>Turnover increased by X%</i> - <i>Sustainable new jobs created</i> | |
| 3. | <i>Add additional rows as necessary</i> | | - | - |

B. Grant Spend and Claim Profile (Excel Spreadsheet)

C. Interim Update Form

Referring back to your Project Plan, tell us what you've achieved in this period.

| | | |
|----|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|
| 1. | What progress have you made? Describe project outputs and the main delivery activities you've started, continued or finished during this reporting period. | |
| 2. | What have you learned during this period? Tell us about: <ul style="list-style-type: none"> • any achievements or unexpected outcomes you'd like to share • 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. | |
| 3. | How did you reach everyone who could benefit from your project? What actions have you taken to ensure this? | |
| 4. | What's planned for the next reporting period? Give us an idea of how well prepared you think you are for the next few months. 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. | |

D. Claim Form

E. Annual Report

Again, referring back to the original Project Plan, this more detailed report will tell us what the project has achieved over the year:

1. A review of original project / activity aim(s) – are these still valid? Do they need to be amended?
2. What activities have taken place over the last year?
3. What's been achieved? More or less than anticipated?

4. What difference has the project made so far? How do you know – what supporting evidence do you have (e.g. survey results, case studies etc.)?
5. What's worked well? What hasn't gone so well?
6. What if anything has changed about your project based on lessons learned during this period?
7. Have project finances matched forecasts? If not, what's happened?
8. What are the key actions planned for the year ahead?
9. What will happen when the funding comes to an end? How are you planning for this?

F. Completion Report

Again, this will refer back to the original Project Plan, Interim and Annual Reports, and reflect on and demonstrate what difference your project has made and what has been learned. Photographs and quotes will help to bring your work alive, so do include them if you can. The report should cover:

1. A review of original project objectives – if you were starting the project again now, would these still be your objectives?
2. What activities (outputs) have taken place over the project lifetime? You can tell us about aspects funded by others too.
3. What's been achieved as a result of the activities (the outcomes)? More or less than anticipated?
4. What difference has the project made? How do you know – what supporting evidence do you have (e.g. survey results, case studies etc.).
5. What worked well? What hasn't gone so well? What have you learned that will inform your future work?
6. Did project finances match forecasts? If not, why was that?
7. What are your plans now? How will what's been achieved be sustained and developed?
8. What other funding did you secure for the project? Did you bring in more resources as the project developed?
9. Anything else that you'd like us to know.

G. Legacy Report

- Is the service or support that your project was providing still running? If so, how is it being resourced?
- Have there been any changes in how the project is delivered since Pen y Cymoedd funding ended?
- What is the financial position of your organisation? Is it solvent? Do you hold contingency reserves?
- *(If relevant)* What are the people that your project employed doing now?

In terms of outcomes

- Is the benefit that your project created still as clear today as it was 6 months ago?
- Do the outcomes that your project generated still exist? If they do, how do you know? What is the evidence that the outcome is still there?