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Sample Grant Monitoring and Evaluation (M&E) Report Questions

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| **Question** | **Grant Stream** |
| **General** | |
| Grant Year covered by the report. Eg. Y1/Y2/Y3 | All |
| Date period M&E Report covers | All |
| Name of Organisation | All |
| Grant title | All |
| Grant amount | All |
| Date of grant payment | All |
| Total payments made | All |
| **Progress update** | |
| No. of people supported within Richmond Foundation’s benefit area (TW9, TW10, SW13, SW14) during the last 12 months | All |
| No. of people supported in all LB Richmond (including the Richmond Foundation benefit area) during the last 12 months | All |
| Total no. of people supported (including outside LB Richmond) during the last 12 months | All |
| Please explain any variation between the expected number of people supported and the actual numbers. Please share any actions that you have taken to reach people who haven't accessed your support in the past.*(max.**250 words)* | All |
| Outputs: Are you on track to achieve output 1/2/3? Your response (please explain any further variations) *(max. 200 words per output)* | Project |
| Outputs: Did you achieve output 1/2/3? Your response, please explain any variations *(max. 200 words per output)* | Gateway |
| Did you meet your outcomes? *(max. 200 words per output)* | Gateway |
| How are you meeting your outcomes?  Include quantitative and qualitative evidence about the extent to which these were achieved *(max 200 words per outcome)* | Project |
| For those at the end of Year 1 or Year 2 of your grant:  Do you expect any alterations to the three identified goals in the next 12 months? Yes / No  If yes explain what these changes are in your response below *(max. 250 words)* | Core |
| Please report on your Three Organisational Goals for the previous year. Include quantitative and qualitative evidence about the extent to which these were achieved *(max. 200 words per goal)* | Core |
| What have you learnt over the past year? What's gone well? What 's not gone well or been challenging? What’s been unexpected or interesting? What have you learned that would be useful to others? (max. *500 words)* | All |
| Please describe how an individual was helped through the grant *(max. 300 words)* | All |
| What difference has the grant made? Include impact evidence and links to any evaluation or research you have done *(max. 250 words)* | Gateway |
| Has this grant enabled you to build any new partnerships, if so what impact has this had on your work? *(max. 250 words)* | Gateway |
| **Organisational update** | |
| Have you had any organisational changes (governance/staffing/significant loss or increase in income etc.)? *(max. 150 words)* | All |
| Have you experienced any positive or negative publicity? *(max. 150 words)* | All |
| What are your priorities for the next 12 months? *(max. 250 words)* | Core |
| What are your three key risks? This includes safeguarding risks.  *(max. 50 words).* | Core, Project |
| Please inform us if you have experienced any safeguarding incidents in the last 12 months. If you have please briefly explain what happened *(max 100 words.* | All |
| Have you made any serious incident reports to statutory regulators (for instance the Charity Commission, Information Commissioners Office, the Fundraising Regulator)? If yes please briefly explain what happened *(max 100 words)* | All |
| Upload your latest Safeguarding Policy/Policies | Core, Project |
| Upload your Employability Liability Insurance | Core, Project |
| Upload your Public Liability Insurance | Core, Project |
| Upload your latest Business or Strategic Plan | Core |
| What difference has the grant made? Include impact evidence and links to any evaluation or research you have done Please only answer at the end of the third year of your grant. | Core, Project |
| How has the grant enabled you to make any organisational changes (e.g. extra administrative capacity, more strategic oversight, attracted other sources of funding)? Please only answer at the end of the third year of your grant. | Core, Project |
| Has this grant enabled you to build any new partnerships, if so what impact has this had on your work? Please only answer at the end of the third year of your grant. | Core, Project |
| **Feedback** | |
| Please rate your experience of working with Richmond Foundation (delete as appropriate) Excellent / Good / Fair /Poor | All |
| Please tell us about any areas of your relationship with Richmond Foundation that have worked well and, in particular, any that have worked less well and could be improved *(max 150 words)* | All |
| **Equity, Diversity and Inclusion (EDI) Monitoring Information** | |
| The data that we are collecting and language used is based on the [DEI Data Standard](https://www.funderscollaborativehub.org.uk/collaborations/dei-data-standard). You can read more about the definitions of the different categories used by the DEI Data Standard [here](https://drive.google.com/file/d/1DXP9e-FcwzDBCLDi5cpudjURHVcTpeof/view) We ask you to update us annually on your organisation leadership. We use this information to better understand the organisations applying for our support. This will inform our grant strategy and how we can improve our funding practice. Information published on your organisation leadership will be aggregated with information from other grant applications, and details for your organisation will not be identifiable. | |
| **Please select any category if more than 75% your Trustees and more than 50% of staff members are people from the community or communities that you serve or have lived experience of the issues that your organisation is tackling**  NB: this isLondon Funders definition of an Equity-Led Organisation.   * Communities experiencing racial inequity * Deaf, disabled, neurodivergent people and/or people with mental health conditions * Faith communities * LGBTQI+ people * People who have migrated and/or have experience of the immigration system * Older people (aged 65 and over) * People who are educationally or economically disadvantaged * Women and girls * Younger people (aged 25 and under) * Other lived experience (examples include: care experienced young people, carers, people recovering from alcohol addiction, sex workers, people whose first language is not English, people who have problems reading, men and boys) * Prefer not to say | Core, Project |
| **Please select any category if more than 50% of your Trustees and more than 30% of staff members are people from the community or communities that you serve or have lived experience of the issues that your organisation is tackling**   * Communities experiencing racial inequity * Deaf, disabled, neurodivergent people and/or people with mental health conditions * Faith communities * LGBTQI+ people * People who have migrated and/or have experience of the immigration system * Older people (aged 65 and over) * People who are educationally or economically disadvantaged * Women and girls * Younger people (aged 25 and under) * Other lived experience (examples include: care experienced young people, carers, people recovering from alcohol addiction, sex workers, people whose first language is not English, people who have problems reading, men and boys) * Prefer not to say | Core, Project |

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| **Declaration** | |
| I confirm that, to the best of my knowledge, all the information I have provided in this Monitoring and Evaluation Form is correct. I have been authorised by the governing body of my organisation (the board or committee that runs my organisation) to submit this report and accept the declaration on their behalf. | All |
| Full name of person completing this form | All |
| Position in organisation | All |
| Email | All |
| Date | All |