

# Evaluation and Reporting Guide

Evaluation is a way for organisations to assess the difference their work has made, learn valuable lessons and increase impact. At the Trust, we use your reports to understand if our funds have been well used, to learn and to share learning with others.

We know that organisations that reflect and learn from their work are more successful. We want to support you to be able to use monitoring and evaluation tools to improve your work, and better tackle poverty and inequality. The Trust offers training and support and simple reporting forms.

If you are reporting on the same project to another funder or use another approach then we are happy to accept different formats that include the key points. Please contact your Grants Manager to discuss. Our evaluation plan template, and the questions for the interim and final report are available on our [website to download](https://www.trustforlondon.org.uk/funding/reporting-and-evaluation/) and you’ll be sent a reminder before the reports are due.

### Step by Step Process

## Stage One - Planning

When your funding has been agreed we will offer you a fully funded place on a course run by NCVO. The course covers the essential information you need to think about your evaluation, understand key principles of monitoring and evaluation, and complete an evaluation plan.

Within 6 months of your grant starting, you will need to submit an evaluation plan. The release of your next grant payment will be dependent on you submitting this plan. However, if this is likely to cause you a problem, please discuss this with your Grants Manager.

You don’t need to wait 6 months to submit the plan – you can send it as soon as it’s ready.

If you are funded as part of the Connected Communities Programme you do not have to send us an evaluation plan, and we won’t send you a reminder unless you ask us to. We do encourage you to take up the training and send us a plan if you can as we think it will help your project – but it is optional.

## Stage Two - Interim Report

If your grant is more than 12 months, then mid-way through your grant you need to send us an interim evaluation report. We need to receive this report in order to release your next payment.

We will remind you when it is due and you’ll have three months’ notice to write it. The outline of the questions we’ll ask is available to download and the link will be emailed to you with the reminder.

The report will need to be completed online, by clicking on the link we send you. You’ll be taken to an online form with the report questions, and you can write or copy-paste your answers into the form. You can save it and come back to it. When you’ve completed the report form, you’ll also be asked to confirm the last 4 digits of your organisations bank account, and the names of the signatories. This means we can release your next payment without asking you for more information.

If you are funded for one year you don’t need to send us an interim evaluation, and only need Stages One and Three.

## Stage Three - Final Report

At the end of your grant, you need to submit a Final Evaluation Report either within 3 months of when the funded work has come to an end, or 9 months from when your final instalment was paid. Future funding from the Trust is dependent on receiving the final report.

We will send you an email reminder when it is due. The outline of the questions we’ll ask is available to download and the link will be emailed to you with the reminder. The process for sending us the report is same as the interim report.

## Annual Report and Accounts

In addition to the interim and final reports for each year of your grant we ask that you send us your annual report and accounts.

## What will we do with the information?

Your Grants Manager will initially read your reports and accounts to understand how the work is going, and if there are any problems, or additional support we can offer. Leads for each programme area, and/or the Learning and Evaluation manager will also read your reports to look for trends, changes in the issues or environment, helpful approaches and to identify key lessons that might be helpful for others. We summarise this for other staff and trustees and use it to help us reflect on our funding priorities and to share learning. You can see our annual reflections on our website, and in our newsletters, and annual review.

## Additional Support

If you require any additional support or anything is unclear, please get in touch. For advice or changes specific to your grant, please contact your Grants Manager. If you require any additional support or anything is unclear, please get in touch:

* Technical / Admin Issues: grants@trustforlondon.org.uk - 020 7606 6145
* Evaluation Support: Hilary at evaluation@trustforlonfon.org.uk or 0208 036 3105

To download copies of templates and further information:

[**https://www.trustforlondon.org.uk/funding/reporting-and-evaluation**](https://www.trustforlondon.org.uk/funding/reporting-and-evaluation)