

Evaluation Guide

We believe that monitoring and evaluation is a useful way of helping organisations to assess the difference their work has made to their beneficiaries and the lessons that have been learned. It also tells us if our funds have been well used.

We want to encourage organisations to set up a monitoring and evaluation system at the start of their grant so that they are clear about the information they need to collect and why. We offer support and training free of charge to help organisations do this if they need it. This is provided by Charities Evaluation Services.

We know that there are many different approaches to monitoring and evaluation and we do not insist on one particular approach. If organisations have already developed a monitoring and evaluation plan for other aspects of their work, this can be adapted for the work we are funding. What we ask is that the evaluation plan is clear about the organisation's aims, objectives, the differences it hopes to make (the anticipated outcomes) and how the organisation will know it has made those differences. We will accept joint reports to us and other funders, if this is appropriate. Please discuss this with us.

Summary of our requirements

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| Stage 1 | An Evaluation Plan – <i>to be submitted within six months (or sooner) from the start of your grant.</i> (Optional for groups funded under our Connected Communities programme) |
| Stage 2 | Interim Report – mid-way through your grant. |
| Stage 3 | Final Report – at the end of your grant. |

All of these reports need to be submitted via your Trust for London Online Portal

Please use the **same username and password** used to apply for the grant and also ensure that your clearly label your documents as **Evaluation Plan; Interim Report or Final Report**.

If you have problems, please contact a member of the Grants Admin Team on 020 7606 6145 or email grants@trustforlondon.org.uk

Stage 1

Within six months of receiving your formal offer of grant you will need to **submit an evaluation plan**. This is optional for grantees funded under our Connected Communities Programme. The release of your next grant payment will be dependent on you submitting this plan, so if this is likely to cause you a problem, please discuss this with your Grants Manager. **Please note – you do not need to wait 6 months to submit your plan, you can do this sooner, if you prefer.**

Training - We will contact you shortly with dates of free training on monitoring outcomes, provided by Charities Evaluation Services, that will help you prepare your evaluation plan. This is optional, as you may have already attended training on evaluation, or you feel confident enough to write your plan without further training. If this is the case, there is a model plan available on our website, as a guide.

Stage 2

If you have been funded for more than one year then mid-way through your grant, you will be expected to submit an **Interim Evaluation**. It is important that **you submit this report mid-way through your grant in order to release your next payment**. Please allow at least 6 weeks for your Grants Manager to read and approve your interim report, so submit your report in enough time to avoid delays to your payment.

Stage 3

At the end of your grant, you will need to submit a **Final Evaluation Report**. This should be submitted within three months of when the funded work has come to an end.

Please note: If you are funded for one year you only need to refer to Stages 1 and 3.

In addition, you will all be expected to submit your annual report and accounts for every year of your grant.

What we will do with this information

Your Grants Manager will read your report and provide you with feedback as appropriate. Information from all the evaluation reports is summarised and presented to our Trustees annually. This helps to increase our knowledge and learning about the work we are funding and also informs our future priorities.

Second visits

During the period of your grant, you may be visited by one of our members of staff. The purpose of this second visit would be to discuss the issues arising from your work and your progress. We will contact you to arrange this, if you are selected for a second visit.

Additional support

If you require any additional support to monitor and evaluate your work, or if anything is unclear, then please contact us to discuss this further.

Useful Links

NCVO Charities Evaluation Services - <https://www.ncvo.org.uk/practical-support/consultancy/ncvo-charities-evaluation-services>

- Provides advice, support and training on all aspects of monitoring and evaluation for the voluntary and community sector.