

MONITORING, EVALUATION and REPORTING

Important guidance for grant recipients

We are delighted to have awarded funding for your project and look forward to seeing how your work progresses. This guidance is designed to help you prepare for the monitoring, evaluation and reporting required as a condition of your grant.

We understand that many organisations may not have the capacity and resources to undertake detailed evaluation, so we aim to keep our reporting requirements clear and simple.

As a grant recipient you will be asked to complete a short monitoring form twice a year, as detailed in the grant agreement. We will prompt you for this information by sending you a template to complete online at least four weeks before it is due. At the end of the project you will be asked to submit a more detailed report, providing information under specific headings.

Although reporting is an essential part of our grant-making process, we would also like to build a relationship with those we fund. Open dialogue and communication is an essential part of this. If at any time you would like to get in touch to share a success, a new development or a challenge you are facing, please feel free to pick up the phone or drop us a line.

If you have any questions about reporting, please contact us on 0207 656 2738 or email bupaukfoundation@bupa.com



Why evaluate?

Monitoring, evaluation and reporting is very important to us. It helps us to better understand the impact of our grant-making and informs our strategic direction and the development of future funding programmes.

We hope that the monitoring, evaluation and reporting we require will also help you to collect valuable information on the impact of your work and how people benefit, what works and what doesn't, and ways in which you might be able to make your work more effective. Clearly evidenced and quantified evaluation and reporting may also play a part in demonstrating the value of your work to other funders or donors and help you to secure future funding.

What to include in your reporting

The Bupa UK Foundation's purpose is to help people live longer, healthier, happier lives. We fund practical projects which aim to tackle critical challenges in health and social care. We are most interested in understanding the impact, direct and indirect, that your work has had on people's health and wellbeing.

The areas we will be asking you to report on reflect the information requested in the application process. Early reporting will focus on project delivery, reach and engagement. Final project reporting will focus on impact, legacy and learning.

Please consider the kind of information we will be asking you for and the data and information it would be useful to have to report on your project before you begin the implementation of your project so that you can ensure you have effective monitoring processes in place from the start.

The main headings we will ask you to report against are outlined below.

1. Delivery of your project against objectives

- What has been delivered during the period?
- Summary of expenditure for the period
- Is the project on track? (Progress against plan)
- Looking back, have there been any significant changes to plan?
- Looking forward, are there any changes on the horizon?
 - Relating to the delivery of the project
 - Relating to project staffing
 - Within your organisation more widely

2. Reach and engagement

- Which specific groups or individuals does your project aim to reach?
- What has been delivered in the period to reach them? (Progress against plan)
- How many people have you reached? In which specific target groups?
- How many people have been engaged in your work, for example, asked for more information, registered to use your service, participated in activities you have delivered

3. Impact

- What specific health benefits has your project delivered? *Please ensure that this is supported by evidence.*
- What has been the most significant change or benefit delivered by the project? *This could relate to the individuals who benefitted from your work, your organisation or the wider community.*

4. Learning

- What has worked well?
- What specific challenges did you face?
- What could have been done differently?
- Are there any key learning points?
- How will you go about sharing any learning?

5. Legacy

- Has this project highlighted any further opportunities to develop or extend your work?
- Will the work you have delivered through this project become sustainable in the longer term? If so, how?

Other supporting information

We welcome additional supporting information that illustrates the impact of your work, such as:

- Examples of promotional or publicity materials
- Examples of any media or social media coverage
- Details of any new contacts, partnerships or networks developed as a result of this work.
- Case studies providing an insight into how individuals have benefitted.
- Photos or video clips.