

Introduction to Our Grant Monitoring Process

Congratulations on your award of a grant from the Hillingdon Community Trust.

The Trust is committed to ensuring that we maximise the benefit that the local community receives from our grant funding, and we monitor and evaluate all grants we have awarded. This normally takes place twelve months after you receive your grant award payment, but for short-term projects we may carry out monitoring sooner. For funding that carries on for more than one year, we normally ask you to complete a monitoring form towards the end of the first year so that the Trustees can review progress before making second year payments. This process is quite simple and very similar to that used by other charitable trusts.

So that you are aware of the information that you will need to provide to the Trust, we are enclosing a sample copy of the grant monitoring form and expenditure list that you will receive later in the project. It's possible that this might be amended slightly between now and then but any changes will be fairly minor. We have also listed below all the documents you will need. You might want to collate these together in one folder to save time when you come to fill in the monitoring form.

Although monitoring may seem a long way off, and you are keen now just to get on with the project we would urge you to take a time to read through these notes and to understand why the Trust monitors projects, and what information we will eventually ask you to supply. It would also be useful if you asked relevant colleagues working on the project with you to read this information so that they understand what might be needed.

What else do I need to return with the Monitoring Form?

In addition to the monitoring form projects are asked to return the following;

- A list of expenditure (see the enclosed sample form which you can use to list your expenditure as you the project develops). You should attach your receipts to this.
- Annual Accounts produced since the grant application was submitted
- Annual Reports produced since the grant application was submitted.
- Pictures of the projects (please indicate if any of these may not be used for publicity – e.g., on the Trust's website, or in our annual report, press releases or newsletter)
- For construction projects a completion certificate (as issued by building control)
- Copies of publicity, press articles or anything else you think we may be interested in which illustrate the benefits of the projects.

Why do we monitor projects?

The Trust is committed to making sure that its grants have the greatest possible impact on people in our community. Monitoring grant awards increases our understanding of what has made projects work most effectively and what has been less successful so that we are better able to assess future applications and provide advice to organisations like yours.

The monitoring process is also designed to help your organisation to review your achievements, repeat what has been successful and learn from areas that have not worked as well as you had hoped and so improve the services you offer.

At the same time, the Trust is itself required to be accountable for the grants it makes, so we need to know that the grant has been used for its intended purpose, and monitoring helps us to do this.

Monitoring visits

Generally we will aim to visit as many projects funded by the Trust as we can. Where possible we find it is very useful to visit when the project is in action. The visit will be carried by one of the Trust's own team, sometimes accompanied by a Trustee.

The Trustees who are responsible for allocating funding have a strong commitment to ensuring that grants make a real difference to the area, so they are often keen to visit projects to gain first hand understanding of what grant funding has achieved. Trustees are always interested in attending any special events organised in relation to projects we have funded and if you would like a Trustee to attend, simply let the Trust office know.

The visit and your completed monitoring form enable us to produce a report to the Trustees. They also enable you to give us feedback on how we can improve our grant-making process.

What happens if circumstances change?

Grants are awarded for a specific project as outlined in the approved application. However we realise that sometimes to achieve the overall objective it may be necessary or desirable to make changes to the project.

Where this occurs, you must contact the Trust to explain the proposed change and background to the revision. The Trust is open to considering requests for amendments to a project as it is always our intention to ensure that grant funding is spent in the most effective way possible.

However it is important to stress that the Trust must be advised of any changes, as promptly as possible, otherwise we may be forced to suspend a grant and demand the repayment of money already paid.