

# Reporting to a funder

A step-by-step guide to writing an evaluation report for a funder

When you receive a small grant, the organisation that gives you the grant will usually ask you to send them some information at the end of the project.

Some funders provide a form for you to fill in. Others just ask you to write a short report and send it to them. This information sheet is mainly focused on writing an evaluation report from scratch, but you may also find it useful when thinking about how to fill in an evaluation form.

The Resource Centre also has information sheets on *Monitoring and evaluation*, *Planning a funding application* and *Writing a funding application*.

## Why write an evaluation?

### Why does the funder want an evaluation?

- ◆ They need to know that you spent your grant on what you said you would spend it on.
- ◆ They need to show their funders that they are using their money wisely. The money they gave to you may have come from donations, the government, businesses or other charities. Just as you have to report to your funders, they have to report to theirs.
- ◆ They want to make sure that they are achieving their own aims. For example, if they aim to support activities that benefit young people, they want to check that the grants they give are doing this.
- ◆ They want good examples of projects that they can use in their publicity, so that they can get more funding to give to more projects in future.
- ◆ You might apply to them again in future. An evaluation shows them whether you are a good organisation to fund.

### Why is it useful for your group to do an evaluation?

Evaluating your project can be really useful for your group. You need to give the funder the information they want, but the process of preparing an evaluation report can help you think about what went well, what didn't go so well, and what you would do differently next time.

Try to involve as many people as possible in doing the evaluation report, as this will help get more ideas about the successes of your project and the problems you have faced. Keep your discussions in mind when you are planning for the future, so that

you can build on your successes and use your experience to improve things for your group.

## Before you start

### Read through your original application

Check what you said you were going to do. Don't panic if what you have actually done is slightly different from your original plans – funders usually understand that plans can change a bit as you go along.

### Check what the funder has asked you to send them

Read through any letters or forms you have received from your funder.

- ♦ Is there a deadline date by which you must send the evaluation to them?
- ♦ Do they ask you to include any specific information in the evaluation?

### Make sure you know what you spent the grant on

Look through your financial records and prepare a summary of how you spent the grant money.

Remember to look at the budget you sent the funder with your application, to remind yourself what the grant was for. For example, if you have organised swimming and football recently, check whether the grant you are reporting on was for swimming, football or both. Make sure you report on the correct activities.

Don't worry if you have spent the grant slightly differently than you planned to. Funders will usually understand that things can end up costing a bit more or less than you originally thought. They will want to know, however, that you used the grant to run the activities you said you would.

If you have spent your money significantly differently than planned, think about why you made this decision. Ideally, you should consult with your funder before making a big change of plan, but if you have already spent the money, think about how your change of plan helped you to achieve your overall aims, so that you can explain this in your report.

### Evaluate the project with your group

The evaluation process will be useful for your group if you do it together, and the more people you get ideas from, the more useful the information will be for your group and for the report. Discuss at a committee meeting or special get-together:

- ♦ What were the benefits of the project to the people who were involved?
- ♦ What do group members think were the best bits of the project, and why?
- ♦ What problems were encountered along the way?
- ♦ What did you do to solve the problems?
- ♦ Did the funding get spent exactly as you planned? If not, why not?
- ♦ Did you make changes or improvements to your planned project along the way?
- ♦ What, if anything, would you do differently in future?

# Writing your evaluation report

Here is a step by step guide to writing your report. Remember that different funders will want different information, so make sure you include anything your funder has specifically asked for.

In general, it is important to include:

## 1. A description of what you did

This should be a short description of the activities you ran, and should include some figures showing how many people took part.

*"We organised 12 basketball sessions for girls and boys aged 11 to 15 years. A total of 14 children attended these sessions."*

*"We organised a street party for the local community which took place on 15<sup>th</sup> July 2019. The street was closed to cars for four hours, and we ran street games such as tug of war and an egg and spoon race. The party was attended by 49 people in total. 8 volunteers were involved in organising it, 3 of whom had not been involved with our group in the past."*

If your funding application focussed on running activities for a particular group of people, such as women or black and minority ethnic people, you should include information about how many people from that group took part.

## 2. Any changes to your original plan

It is quite common to make some changes to your project plan as you go along. It's difficult to know in advance exactly how things are going to work out. You might have to change things if you don't get all the funding you apply for. You might also choose to change things if you work out a better way of doing them or in response to requests from people taking part.

Funders are usually understanding about small changes of plan, and it is important to be open about these. It shows you are trustworthy, and may also be an opportunity to show how the changes have been positive.

*"We originally planned to run weekly table tennis and badminton sessions over a six month period. However, after six weeks we had very few people taking part in table tennis, and badminton was oversubscribed. In order to include as many people as possible and respond to the interests of the community, we decided to cancel the table tennis sessions and run two weekly badminton sessions instead."*

*"Unfortunately we did not receive all the funding we had hoped to get, so had to think about how to run the project on a smaller budget. Instead of providing a meal at our monthly social events, the community brought food to share with each other, which everyone really enjoyed. We had planned four trips to London tourist attractions. Instead we ran three trips to more local destinations, two of which were free (Littlehampton beach and Cuckmere Haven), so we only had to pay entrance fees for one (Arundel Castle). The community really enjoyed discovering these local Sussex places which many people didn't know about before, and some are now planning to visit them again with their families."*

### 3. How did you collect information about your success?

Briefly describe what you did to collect information about how your work was going. This might include counting the number of people that took part, and asking them how your project benefited them.

*"We kept a record of how many boys and girls attended each session."*

*"We carried out a survey at the beginning and end of the project, so that we could measure how people felt about their health and fitness before and after they had attended the swimming lessons."*

The Resource Centre has a more detailed information sheet, *Monitoring and evaluation*, to help you with the gathering information about how successful your work has been. We also have an information sheet about *Designing and using surveys*.

### 4. How did people benefit from your work?

Look back at your original application to what you said the aims of your project were. State whether you achieved your aims, and give any evidence you have. If the funder has any particular focus of their own, make sure you also explain how your project matched up to this. For example, if the funder only funds health projects, explain what the health benefits of your project were.

Here is an example:

In our application we said we had four aims:

1. Reduce isolation by giving people an opportunity to spend time with one another.
2. Increase people's participation in physical exercise.
3. Improve children's knowledge of local history.
4. Involve new people in volunteering and help them develop skills which will improve their chances of getting a job.

Here is some evidence that shows how we achieved these aims:

1. We conducted a survey of everyone who took part in our project. 64% of people said they had made friends by coming to our events and that they now saw those friends outside of the group. 96% of people said they looked forward to the group activities as a time when they would get to chat to friendly people. This shows we successfully reduced isolation and provided an opportunity for people to spend time with one another.
2. We asked everyone who took part in our swimming sessions whether they felt they got more physical exercise as a result of the project. 100% people said they did, and 60% said it was their only regular physical exercise. This shows we successfully increased people's participation in physical exercise.
3. We took children from our community on a history tour of Brighton, run by a local history group. Afterwards they made posters showing everything they had learnt. This shows we improved children's knowledge of local history.

4. There were nine volunteers involved in running our project. Four of these had not been involved in previous projects. Six were unemployed before the project began. By taking part they developed many skills, including organising an event, designing publicity and leading a group activity. Three people also gained training in First Aid, and one person in Food Hygiene. These experiences will make people more likely to find employment in future, and one person, who helped run the children's activities, has already gained a job in a playgroup.

## 5. How did you spend the grant?

You need to provide a breakdown of how you have spent the grant money. Some funders will want you to provide receipts to back this up. If there is anything significantly different between how you have spent the grant and how you said you would spend it, make sure you have explained this in the "Any changes to the original plan" section.

For example:

Swimming lessons:	£304
Venue hire:	£350
Refreshments:	£90
Transport:	£254
Total:	£1000

## 6. Photos and other evidence

It is great if you can include photos, quotes and other evidence with your report. It brightens it up and shows the funder how much your community really enjoyed the project.

If you use photos make sure this is OK with the people who are in them. For more information about this, see our information on *Taking photos at community events*.

Think about other visual things that could brighten up your report. For example, if children have done any artwork as part of the project, you could include that. If you have created a logo for your group, include that. If your project involved training people, you could include a copy of a certificate.

Quotes are also a great way of showing how much the project meant to people. If you conduct a survey, include a question which asks people to say why the project is important to them, or why they come along to the group activities. You can then use these quotes in your report. If you haven't done a survey, you could ask a few people from the group to tell you what the project meant to them, and write down what they say.

If you can find some quotes which directly relate to the aims and benefits you have described, this is great. If not, just include any quotes which show that the project was important to people.

*"Coming to the weekly coffee mornings has made a really big difference to me. I had recently retired and was feeling quite lonely. It has allowed me to make friends with people who live close by, which makes me feel much more at home in the neighbourhood."*

*"I like football club. I have made new friends. Now I play with my friends every day in the park. This makes me happy because before I just went home on my own and played on my computer."*

*"The best thing about the event was spending time with people from my home country, and giving the children a chance to learn about their cultural heritage."*

## 7. Conclusion

Finish off your report with a short concluding statement, which sums up what you have said and ends on a positive note. You can also mention the kinds of things you are thinking of doing in future. This is particularly important if you are hoping to receive further funding from the same organisation.

*"As you can see, the funding you have provided has been very important for our group. We have run a successful project and this has really improved things for a lot of people in our community. Please feel free to get in touch if you would like any more information."*

*"The funding you have provided over the past year has allowed us to build up our organisation and get more people involved. We have developed successful activities which we will continue in future. We have also gained valuable experience which will help us run new activities in the coming year. Our plan is to increase the number of sports activities we run, so that we attract a wider range of people, and to focus especially on activities that are accessible for wheelchair users."*