

# Portfolio monitoring form

(End of funding)



## What's this form for?

- **Use this form to** describe what you've achieved by running your project. By your project we mean the activities, services or facilities we have funded, as described in our original offer letter, together with any changes we agreed with you since then.
- **Don't use this form to** inform us about changes to your contact, organisation, bank account or project details (including any budget changes). We expect you to discuss these changes with us before they happen and submit the relevant forms, which you can get from your funding officer.

## How to fill in this form

- Make sure you've saved this form to your own computer and are using Adobe Reader version 10.0 or above.
- You need to answer all the questions marked with an asterisk\*. When you've finished, select Check my form is complete at the bottom of the page.

Form reference

Project ID

Organisation name

Portfolio name

Portfolio year

Reporting period

# Part one – Looking back

## 1.1 What progress have you made?\*

Describe the main activities you've started, continued or finished during this reporting period.

You can write up to 2,000 characters (about 300 words) and attach a separate document with more detail if you need to.

*SAMPLE*

Character count:

## 1.2 How much change has happened?\*

Summarise how much progress you've made towards achieving your portfolio outcomes.

You can write up to 300 characters in each box (about 50 words). Also complete and attach a Portfolio outcomes spreadsheet with details of the progress each individual project has made.

Your portfolio outcome		
Change indicators	By when?	How much change has happened so far?*
If you've achieved more or less change than you planned, explain why you think this is.		

### 1.3 What have you learned? \*

Give details of:

- any achievements or unexpected outcomes you'd like to share with us
- any problems you've faced and how you've tackled them
- how you'll use or share what you've learned from your own monitoring or evaluation
- any changes you'll make to your portfolio because of what you've learned

You can write up to 2,000 characters (about 300 words) and attach a separate document with more detail if you need to.

**SAMPLE**

Character count:



Explain any significant differences between the amounts you've received and spent and how this may affect your portfolio. If you're not sure whether the difference is significant please discuss this with your funding officer before you return the form to us.

You can write up to 2,000 characters (about 300 words) and attach a separate document with more detail if you need to.

**SAMPLE**

Character count:

# Part two – Equality monitoring

## 2.1 Who has benefited from your portfolio?\*

For each category give the percentage of people who have benefited from your portfolio during this reporting period. You should only give details of the direct beneficiaries (the people who use the projects in your portfolio), rather than any indirect beneficiaries (for example, their family).

The total for each table should always be 100 per cent.

Ethnic background	Percentage (%)
White	
English/Scottish/Welsh/ Northern Irish/UK	
Irish	
Gypsy or Irish Traveller	
Any other white background	
Mixed / Multiple ethnic groups	
Mixed ethnic background	
Asian / Asian UK	
Indian	
Pakistani	
Bangladeshi	
Chinese	
Any other Asian background	
Black/African/Caribbean/Black UK	
African	
Caribbean	
Any other Black/African/ Caribbean	
Other ethnic group	
Arab	
Any other	
Total	

Gender	Percentage (%)
Male	
Female	
Total	

Age	Percentage (%)
0 – 24 years	
25 – 64 years	
65 + years	
Total	

Disability	Percentage (%)
Disabled	
Not disabled	
Total	

Religion or belief	Percentage (%)
No religion	
Christian	
Buddhist	
Hindu	
Jewish	
Muslim	
Sikh	
Other religion	
Total	

Sexual orientation	Percentage (%)
Heterosexual	
Lesbians, gay men or bisexual people	
Total	

Only complete the following table if your project is delivered in Wales:

Welsh language	Percentage (%)
People who speak Welsh	
People who do not speak Welsh	
Total	

Only complete the following table if your project is delivered in Northern Ireland:

Community background	Percentage (%)
Protestant	
Catholic	
Other	
Total	

Only complete the following table if we asked for this information in your application form. If you are unsure whether to complete this table contact your funding officer:

Detailed age breakdown	Percentage (%)
0 – 4 years	
5 – 9 years	
10 – 14 years	
15 – 19 years	
20 – 24 years	
25 – 34 years	
35 – 44 years	
45 – 54 years	
55 – 64 years	
65 – 74 years	
75 – 84 years	
85 + years	
Total	

Explain what your percentages are based on, for example, data you routinely collect, surveys or monitoring forms.

You can write up to 750 characters (about 100 words).

Character count:



2.2 How well did you reach everyone who could benefit from your project?\*

Describe what you’ve done to make sure everyone who could benefit from your project knew about it and was able to get involved. If your project hasn’t been as effective as you would have liked, explain what you’ll do differently in the future.

You can write up to 2,000 characters (about 300 words).

Character count: 

00

# Part three – End of portfolio review

## 3.1 Has your portfolio brought about the changes you expected it to?\*

Describe how successful your portfolio was in bring about the changes you wanted to achieve. If your portfolio did not bring about some of the changes you expected explain why you think this was.

You can write up to 2,000 characters (about 300 words) and attach a separate document with more detail if you need to.

Character count: 

00

## 3.2 How much did you spend?\*

Provide a breakdown of your actual expenditure for the entire portfolio. You'll need to return any money not spent to us so we can use it to fund other projects. Please discuss this with your funding officer before you return the form to us.

	Total project costs		Funding from BIG		
	Planned	Actual	Received	Spent	Difference
Management					
Portfolio revenue					
Portfolio capital					
Total					

### 3.3 What have you done in the last year to ensure the benefits of your project have a lasting impact after the funding from BIG ends?

This may include:

- adopting the approaches from your project more widely across your other work
- encouraging other organisations to respond to your achievements by changing what they do or how they do it
- continuing some or all of the project with other funding.

You can write up to 2,000 characters (about 300 words).

SAMPLE

Character count: 00

## Part four – Declaration

Check the box to confirm that:

- the information in this report is accurate and true and has been approved by the governing body of your organisation
- the money from BIG has been used exclusively for the portfolio described in your original application, together with any changes you've agreed with us since then
- there haven't been any significant changes to your portfolio or the governance of your organisation apart from any you've told us about and we've agreed to in writing
- you've told us about all other sources of funding and you haven't received any duplicate funding for the portfolio activities, services or facilities BIG is paying for
- you are seeking to achieve value for money for your portfolio by securing goods and services at reasonable prices
- your organisation is keeping full and proper accounts and records, including invoices and receipts, which show how the money from BIG has been used
- your organisation has an equal opportunities policy and, if working with children, young people or vulnerable adults, a safeguarding policy; these policies are carried out and regularly reviewed to ensure they adhere to current legislation and regulations
- your organisation hasn't disposed of any BIG funded assets during the monitoring period without getting permission from us in writing
- your organisation is following all current statutory requirements and other laws and regulations relating to the portfolio and its work including: adherence to employers' liability insurance; the national minimum wage; the working time directive; health and safety; safeguarding of children, young people and vulnerable adults; data protection and intellectual property rights legislation.

☐

I agree\*

### Attachments

Please attach:

- examples of how you've acknowledged Big Lottery Fund support in your publicity
- copies of letters confirming any other funding you've secured for your portfolio since your last monitoring report
- anything we've asked you to send us as part of our monitoring for this programme.

Please don't attach other files (particularly pictures). Instead, send anything else you'd like us to see by email or post directly to your funding officer.

**You can attach files up to a total of 8MB**