THE MONDAY CHARITABLE TRUST
ANNUAL REPORTING TEMPLATE

This reporting form helps the Monday Charitable Trust (MCT) to track the progress of grants and understand the impact its funding has had. Please be as open and candid as possible, both in terms of the progress you have made and in terms of identifying how we could improve.
This form has three sections:

•   **Section 1** asks for summary information about your organisation and the organisation's performance over the grant period.

•   **Section 2** asks about progress where a grant has been used to support a specific project

•   **Section 3** gives space for any other information you would like to provide.

Please try to answer the questions in a concise manner but include as much information as you think is relevant and useful for us to know. Feel free to refer to pages in accompanying documents (such as external evaluation reports or budgets) to save repetition.

1. About your organisation

This section asks for general information about your organisation and its work, and also for more specific information about performance over the course of the grant.

A. General information

Organisation name:	
Contact name and title:	
Contact phone number:	
Contact email:	

Brief description of purpose of MCT funding (50 words max)

Annual income	£	Annual expenditure	£

Total size of grant	£

Grant start and end dates		

Total number of staff (full time equivalent):	

Annual income	£	Annual expenditure	£

Total size of grant	£

Grant start and end dates		

Total number of staff (full time equivalent):	

B. Organisational performance over the course of the grant

Activities: Have your overall activities changed over the course of the grant? If yes, please explain how. (150 words max.)

Outcomes and impact: What have been the organisation's main outcomes and impact in this period? How have you measured this? Is this better or worse than expected? If so, why do you think this is the case? How have you used information about your outcomes and impact to improve your activities? (250 words max.)

Management: Has either your senior management team or trustee board changed over the course of the grant? If anyone has left, please explain why. If anyone has joined, please summarise their background. (150 words max.)

Finances: How has your income and expenditure matched projected budgets? Have you received any major grants or other sources of income over the course of the grant? Has there been any change in your financial risk? (150 words max.)

Context: Tell us about any significant changes there have been during the past 12 months in the context in which your organisation operates. For example, have there been any policy changes that affect the well-being of the people who benefit from your work, or have the needs of your beneficiaries changed?

Challenges: What were the main challenges you experienced over the course of the grant? What steps did you take to overcome these? What lessons did you learn? (150 words max.)

Strategy: Have you changed your strategic focus or priorities during this grant period? And if so, what were the reasons behind this? (150 words max.)

2. The funded project

If the purpose of your MCT grant was to fund a specific project, please tell us about the progress you have made over the course of the grant. If your MCT funding was an unrestricted grant or to provide core support, please leave this section blank and move on to Section 3.

Project title:			
Project start and end dates:		**Number of beneficiaries reached:**	
Total project budget:		**Other funders supporting the project:**	
Total MCT grant as % of total project budget:		**Amount of MCT grant spent:**	

Project progress

Funded project: Please briefly describe the funded project and its main aims. (100 words max.)

Progress of funded project against aims: Please tell us the progress you have made against the project aims in the past year. Are there any objectives you haven't met? If yes, let us know what action you have taken to address this. (200 words max.)

Milestones

Please provide information on progress against milestones identified in the grant agreement in the past year. This table is provided as a template but feel free to edit this table or provide information on progress against milestones in an alternative format.

Milestone (including target if applicable)

Progress against milestone (and target if applicable)

Explanatory notes (please provide further narrative description of your progress)

Measurement of outcomes and impact: What outcomes and impact has this project achieved in the past year? How do you measure this? Were there any negative impacts or unintended consequences? How have you used information about your impact to improve your activities? Please focus on outcomes and impact of this funding. (200 words max.)

Multi-year funding: If you are reporting on a multi-year funding commitment, please review your progress over the course of the grant to date. What is your overall progress against milestones? Do you have longer term information on your outcomes? Please include any relevant information not covered in the boxes above. Leave blank if reporting on the first year of funding. (150 words max.)

Other information

Staff: Were there any major changes to the project team? What is the level of staff turnover on the project? (150 words max.)

Finances: Was there any significant overspend or underspend of the grant against particular budget lines (10% variance either way)? If so, what was the reason, and what did you do to address this? (150 words max.

Risks: What will be the main challenges facing the project in the next reporting period? How will you deal with them? How have you addressed risks identified in previous reporting forms? (150 words max.)

Course correction: Are you considering any modifications for the next stage of the project? If so, what do these look like, what are the reasons for them, and will they have an impact on the expected results of the project? (150 words max.)

Future plans: If your organisation intends to sustain and/or scale up this project after funding from the MCT ends, what are you doing or do you intend to do to support this? (150 words max.)

3. Further information

Case study: Please include a short case study to illustrate how funding received from the MCT has benefited your beneficiaries. (200 words max.)

Feedback: Is there any feedback that you would like to give to the MCT? Is there any other support that you would like them to provide? (150 words max.)

Any other information: Is there anything else you would like us to know about, which has not been captured elsewhere? (150 words max.)

Documentation

If you have produced any other documentation over the grant period that might be useful for us to see, please send them along with this form.

- Specific budget for the project (if changed from the previous report)
- Any evaluations done for other major funders
- Any other documents that would be useful for us to see