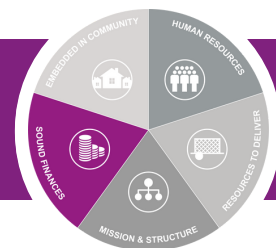


INCOME GENERATION: IMPACT REPORTING

Understand monitoring, evaluation & financial reporting in fundraising



Introduction

A regular requirement of accepting a grant or contract from a funder is having agreed monitoring, evaluation and financial reporting practices in place. Although it may be required by individual funders, it should be seen as a valuable opportunity to demonstrate the difference you make in your local community, to wider stakeholders and to ensure that your group is running as effectively as it can be.



Monitoring - what to measure/track?

Following the application process, you will have identified your:

1. Purpose - what your project is trying to achieve
2. Impact - the desired long term effects of the project's activities
3. Outputs - the products, services or facilities that result from the project's activities
4. Outcomes - the direct changes, benefits or learnings that result from the project's outputs

Identify your Indicators

To begin measuring and tracking, you will need to identify an "indicator" for both your outputs and outcomes - a well-defined measure which will show whether something is happening.

Examples:

Output - 34 football sessions delivered



Indicator - Number of football sessions delivered

Outcome - Improved attitudes to learning & attendance in school



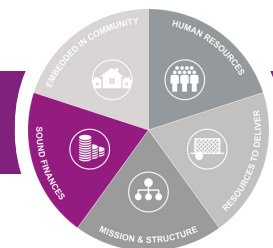
Indicator - Extent to which participants report change in attitude to learning.

Measuring Outputs

Your outputs should be relatively easy to measure - these are your group's basic numbers and should be factual 'hard data' such as:

- total number of hours delivered
- total number of qualifications gained
- how the funding is being spent
- demographic information (age, gender, ethnicity)





SPORTED TIP

Important data collection information

Remember that when it comes to data collection, you need to ensure that you are compliant with the EU General Data Protection Regulation. You have a responsibility to your participants (and when relevant guardians/parents) to explain what data you intend to collect and how you will use/share it.

Sport and Recreation Alliance has produced a free GDPR toolkit for the UK Sports Sector. It is a set of templates, resources and guidance notes to help organisations across the sector, from national organisations down to grassroots clubs meet the requirements which came into force on 25 May 2018. Visit sportandrecreation.org.uk/gdpr

Measuring Outcomes

It is important to spend time thinking about your outcomes, which will tell you whether or not something is happening as a result of your activities. An outcome can be as straightforward as a certificate following a training course. Or you can have 'softer outcomes' that don't involve tangible results, which may take more planning. Common 'softer outcomes' are:

- increases in confidence or self-esteem
- beginning to eat more healthily
- better awareness of issues
- developed skills (e.g. teamwork, communication)
- increased sense of community cohesion
- improved mental health

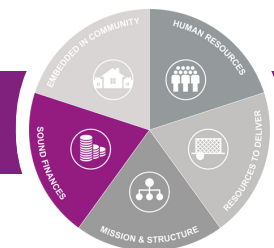
The 'softer' data can be captured through case studies, recorded verbal feedback, questionnaires and surveys. Sported can help you identify appropriate surveys, through Light Touch Support or the Sported Impact Journey.

Monitoring Plan

Once you have identified your indicators for your outputs, outcomes, you should put together a monitoring plan that brings everything together and includes when you are going to collect this information and who will be responsible for doing so. See examples below:

Output	What are you going to measure?	How are you going to capture this information?	When?	Who?
Your group's basic numbers	These are your indicators and should start with words like "Number of", "Type of", "Percentage of" and "Extent to which"	This is your method or approach (e.g. impact data tool, feedback form, survey, interview, etc.	When will this be collected? Weekly, annually	Who will do this?
34 football sessions delivered	Number of football sessions delivered	Registration form at sign-in desk/attendance record	End of project	Coach Leah

**Taken from Sported Impact Journey*



Outcome	What are you going to measure?	How are you going to capture this information?	When?	Who?
Direct changes, benefits or learnings that result from the project's outputs	These are your indicators and should start with words like "Number of", "Type of", "Percentage of" and "Extent to which"	This is your method or approach (e.g. impact data tool, feedback form, survey, interview, etc.	When will this be collected? Weekly, annually	Who will do this?
Improved attitudes to learning & attendance at school.	Extent to which participants report change in attitude to learning	Informal interview with participants. Attendance survey completed by school.	Pre- and post-programme	Nadia (school)

* Taken from *Sported Impact Journey*

Evaluation - making sense of your data

Evaluation is an assessment of the data you have collected throughout the programme.

If you have followed our guidance for monitoring above, the data will begin to demonstrate the difference your programme has made to the group, the individuals, and to your wider community. It will also allow you to improve your programmes in the future.

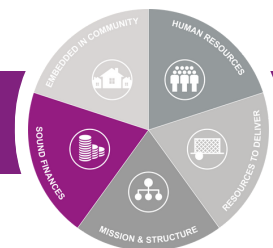
Start your evaluation by spending some time analysing your data:

- Were there any changes that you didn't expect?
- Did something not work as well as you had hoped?
- What worked well?
- How can you use this learning to shape your programmes in the future?

SPORTED TIP

Top Tips for Monitoring & Evaluation

- Make sure your data collection is realistic for your group and your participants, and that it's included in any costings or project plans
- Don't try to collect data about everything. It's better to measure one thing and measure it well, than to measure lots of things and struggle to do it well
- Keep accurate records, receipts, agreements and contracts from the beginning, and keep it up to date - it's really hard to try and go back at the end of the project to find the detail you need
- Use any relevant templates both from the funder and your partners to reduce your workload
- Ensure that everyone in the organisation understands what data needs to be collected and takes responsibility for its collection



How should I collect financial data relating to my project?

Funders will usually have their own financial data collection templates and their own reporting schedules. Make sure you are familiar with these before you accept payments and find out if there is a helpline to assist you. If they don't have their own templates make sure that you work where possible to agree a format that they like before you start. Regardless of reporting requirements, make sure to keep your own accurate financial records.

SPORTED TIP

Top Tips for financial reporting to save you time and resources

- Set up a separate cost centre record to manage the fund
- Produce a set of constantly updated income and expenditure records and where possible use a format that allows you to record actual spend against predicted spend
- Keep all your purchase receipts, contracts, payroll ledgers and agreements with suppliers as they may be requested at the project's end
- Update your records regularly as it's often hard to track back

Need more advice?

If you have any questions about this guide or would like to develop your impact reporting further with a Sported volunteer who specialises in impact, [request Volunteer Support](#) from the Sported Hub.