



Tool 11: Monitoring

Grant monitoring report - declaration by partner organisations	
Basic information	
Partner name	<input type="text"/>
Address	<input type="text"/>
Principal contact	
Name	<input type="text"/>
Tel	<input type="text"/>
email	<input type="text"/>
Project for which grant being made	<input type="text"/>
Project duration	
Start date	<input type="text"/>
Estimated completion date	<input type="text"/>
Reporting period	
From	<input type="text"/>
To	<input type="text"/>
Date report due	<input type="text"/>
Date submitted	<input type="text"/>
Report type	<input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> Six-monthly <input type="checkbox"/> Final
Amount of grant (also state local currency if applicable)	<input type="text"/>
Whether single grant or stage payment	
Single grant (tick)	<input type="checkbox"/>
Stage payment	
Frequency of stage payments	<input type="text"/>
This is stage payment number [] of []	

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Period for which grant is being made

From

To

Total amount of grants to date (including this one)

Date next funding request expected

Project objectives and milestones

Summarise planned key stages and milestones

If project has already received funding, state whether progress to date is within plan

State reasons for any significant variation from plan, and action required

Narrative report submitted

Yes - attach

No - state/attach other evidence

Summary of achievements and key developments

Any delays in project implementation. If so, explain reasons

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Summary of main risks, challenges or significant problems

Significant changes to project plans and/or activities

Financial reporting

Budget utilisation report

Yes

No

Confirm information/documentation received (indicate all that apply)

Invoices, bills etc

Bank statements

Management accounts

Audit reports

Other (state)

Budget monitoring report

Yes

No

Date and amount of last funds received

Amount requested for next funding period

Summary of overall budget and expenditure year to date, including variance

Overall budget

Spend YTD

Variance

Amount

%

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Summary of action required to correct variances

Specify any new funding received

Source

Amount

Purpose

Duration

Specify any key changes in personnel

Summary of arrangements for periodic financial reports to be made

Beneficiaries/Impact

Details of charitable services provided by project, including number and distribution of beneficiaries (if applicable)

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Any proposed changes to agreed selection criteria

Any proposed changes to agreed identified beneficiaries

Do beneficiaries know their entitlements?

Have reports been given to beneficiaries and other stakeholders?

Feedback received (attach or summarise as appropriate)

- Govt agencies
 NGOs
 Beneficiaries
 Other

Declaration

The information provided on this form, and the attached supporting documents, are a true and accurate report of project activities and use of funds provided by the charity.

Signed

Date

Position