

Sir Halley Stewart

TRUST

Monitoring guidelines

The Sir Halley Stewart Trust is deeply committed to understanding the outcomes and lasting impacts of the grants it awards and to what extent the Trust is meeting its priorities. This information helps to inform our future grant making policy.

Successful applicants are obliged to provide monitoring updates periodically throughout the grant's duration and beyond. Submitting reports is a fundamental requirement outlined in the terms and conditions of all grants. Failure to respond to these monitoring requests may result in the withholding of grant payments, revocation of the grant, and the inability to apply for future grants.

Interim Reporting:

An interim report will be requested during each grant year. The payment of grant funds is contingent upon the receipt of these interim reports. There are no strict guidelines regarding the format of interim reports, allowing groups to provide information in the way they feel is most suitable, including links to videos, presentations, written documents, etc.

Outcomes Report (End-of-Grant Report):

An outcomes-focused questionnaire will be requested at the project's end date (which was provided in the application). This questionnaire asks about the progress made in achieving the project's original aims and objectives, as well as the outcomes experienced by individuals, broader communities, the grantee, or relevant policy/practice. A template of this questionnaire is available on our website.

Although grantees can submit only the outcomes questionnaire if they choose, we are also very keen to receive more details reports from grantees, supporting information and copies of published papers which help us to understand in more depth what was achieved. This can be in any format.

Some groups have reported that they found it useful to complete this report as a team exercise as this helped to draw out richer and more detailed information.

Impact Reporting:

Three years after the project's end date, an impact-focused questionnaire will be requested. Grantees will be asked to reflect on the longer-term impacts achieved concerning individuals, broader communities, the grantee, or pertinent policy/practice. Additionally, insights into any professional or career-related long-term impacts, if applicable, are welcomed. A template of this questionnaire is also available on our website.

Considering that the request for this report occurs some time after the project's conclusion, and individuals involved may have moved on, we request grantees to keep us informed of any changes in contacts. Moreover, we will require contact details for the Head of Department or CEO, who will be copied on all monitoring requests for visibility purposes.

Reporting Timescales:

We appreciate that projects often experience challenges. If you are having difficulties delivering your project, please do not wait until your annual report is due. Contact us as early as possible, particularly if you are likely to change your methodology or timeline. We are happy to collaborate with grantees to adjust reporting dates to align with the project's progress.

Acknowledging our grantees' busy schedules and scarcity of time, we encourage brief responses to monitoring requests rather than no response.

If you have any questions at all, please feel free to contact the Grants Team.