

## Introduction

At the end of each 12-month period, you must submit the Active Lifestyles Annual Monitoring Report, which will report and reflect on how well you achieved the goals and targets set in your application. This form is your opportunity to tell us about the progress of your grant during the last 12 months.

Please ensure that this form is completed and submitted promptly.

We cannot release your next grant payment until we have reviewed and approved this report.

Please get in touch with your Grants Officer if there are circumstances that might prevent you meeting the deadline.

### ANNUAL REVIEW PROCEDURES

Once we have received your completed Annual Monitoring Report we will review it. As part of the review we may make contact with you to arrange a time to talk about your report on the telephone or face to face. If we visit you as part of our annual review our auditors may come with us to carry out a detailed check designed to ensure that you are fulfilling all our terms and conditions of grant as laid out in our grant contract. Providing the review is satisfactory we can process your next payment claim.

## Using this form

This form is web-based so you cannot save it as a file. However, every time you click NEXT at the bottom of the page, that page is saved and the next time you click on the link to the form, you will find the information you have already entered. You can edit this information as long as you have not clicked on SUBMIT at the very end of the form.

To move to the next page, click on NEXT at the bottom of each page. (The last page says SUBMIT. Don't click on that unless you are completely finished with your form).

To go backwards in the form, click on PREVIOUS at the bottom of the page. This will keep track of what you've done on the current page. DO NOT CLICK "BACK" on your internet browser as this will lose your work on the current page.

To leave the form at any time, click on EXIT THIS REPORT at the top right corner. (Remember to click NEXT for any pages you've been working on first).

If you would like to print a copy of the report, you need to print it page by page. Remember you can use PREVIOUS and NEXT to navigate to which pages you want to print.

Please note, any square text box you are adding free response information to will automatically expand to hold the information. But you will only be able to see it all by scrolling, which limits what you see when you print.

## Project background

1. Name of the project

2. Project URN

3. Name of contact person

4. Lead organisation name

5. Project start date

6. Size of your grant

Medium (£6,000-£30,000)

Large (£30,000-£100,000)

7. Was your Active Lifestyles project... (please tick one)

a brand new project?

an extension to an existing project?

## 1.1 Current programme of activities

1. Which of the following best describes the activities that have been delivered by your project? (choose only one main activity)

Providing physical activity programmes or promoting physical activity

Supporting partnerships between sectors

Providing training for coaches or volunteers

Please provide a brief progress in the table below describing the progress of your project and key milestones during the reporting period. (Refer to your progress made against your Projected Programme of Activities)"

### 2. Activities

1	<input type="text"/>
2	<input type="text"/>
3	<input type="text"/>
4	<input type="text"/>
5	<input type="text"/>
6	<input type="text"/>

### 3. Frequency, duration & date

1	<input type="text"/>
2	<input type="text"/>
3	<input type="text"/>
4	<input type="text"/>
5	<input type="text"/>
6	<input type="text"/>

### 4. Location/venue

1	<input type="text"/>
2	<input type="text"/>
3	<input type="text"/>
4	<input type="text"/>
5	<input type="text"/>
6	<input type="text"/>

### 5. Number of beneficiaries

1	<input type="text"/>
2	<input type="text"/>
3	<input type="text"/>
4	<input type="text"/>
5	<input type="text"/>
6	<input type="text"/>

### 6. Types of beneficiaries

1	<input type="text"/>
2	<input type="text"/>

3

4

5

6

7. How is this different to your projected programme of activities?

1

2

3

4

5

6

Please note that the boxes below will hold as much text as you would like to type into them. However, if you print the form you will only get what you can see without scrolling down.

8. Reasons for any variations

9. If you have more than 6 activities, please provide the above information about any additional activities.

## 1.2 Financial Review for Reported Year

Please tell us about the income received and actual costs of providing your grant scheme for the reporting year. The expenditure should detail only the Big Lottery Fund grant and any cash partnership funding; do not detail any in kind support here.

INCOME SUMMARY for this reporting period

### 1. Source – Name of funding organisation

BIG	<input type="text"/>
1	<input type="text"/>
2	<input type="text"/>
3	<input type="text"/>
4	<input type="text"/>

### 2. Anticipated Income at Application Stage

BIG	<input type="text"/>
1	<input type="text"/>
2	<input type="text"/>
3	<input type="text"/>
4	<input type="text"/>
TOTAL	<input type="text"/>

### 3. Actual Income received to date (£)

BIG	<input type="text"/>
1	<input type="text"/>
2	<input type="text"/>
3	<input type="text"/>
4	<input type="text"/>
TOTAL	<input type="text"/>

### 4. Difference (+/-)

BIG	<input type="text"/>
1	<input type="text"/>
2	<input type="text"/>
3	<input type="text"/>
4	<input type="text"/>
TOTAL	<input type="text"/>

5. Please explain any differences between your anticipated and actual expenditure and income.

6. How much ADDITIONAL funding have you secured for your project in the project year? (only count funds secured after your project started)

Income generated through fees

Income generated through other sources

EXPENDITURE FOR THIS REPORTING PERIOD

Please provide details of your expenditure for this monitoring period, providing your total spending in the first two columns and the Big Lottery Fund's contribution to each of these in the next two columns.

7. Total original budget (as agreed at the beginning of the monitoring period)

1) Sports or physical activity equipment

2) Contract staff

3) Salaries (inc NIC & pensions)

4) Volunteer expenses

5) Premises costs (rent, rates etc)

6) Travel & transport

7) Administration costs

8) Activity and material costs

9) Advertising costs

10) Professional fees

11) Training costs

12) Info, educ and promo materials

13) Insurance

TOTAL

Total excluding equipment

8. Total actual expenditure

1

2

3

4

5

6

7

8

9

10

11

12

13

TOTAL

Total exc equipment

9. Original Big Lottery Fund contribution (as agreed at the beginning of the

monitoring period)

1) Sports or physical activity equipment	
2) Contract staff	
3) Salaries (inc NIC & pensions)	
4) Volunteer expenses	
5) Premises costs (rent, rates etc)	
6) Travel & transport	
7) Administration costs	
8) Activity and material costs	
9) Advertising costs	
10) Professional fees	
11) Training costs	
12) Info, educ and promo materials	
13) Insurance	
TOTAL	
Total excluding equipment	

10. Actual Big Lottery Fund contribution

1	
2	
3	
4	
5	
6	
7	
8	
9	
10	
11	
12	
13	
TOTAL	
Total exc equipment	

11. Please explain any significant variances against budget.

## Section 2: Projected Progress

### 2.1 Projected programme of activities

Please detail in the table below what you intend to do in the next monitoring period.

#### 1. Activities planned

1	<input type="text"/>
2	<input type="text"/>
3	<input type="text"/>
4	<input type="text"/>
5	<input type="text"/>
6	<input type="text"/>

#### 2. Frequency, duration & date

1	<input type="text"/>
2	<input type="text"/>
3	<input type="text"/>
4	<input type="text"/>
5	<input type="text"/>
6	<input type="text"/>

#### 3. Location/venue

1	<input type="text"/>
2	<input type="text"/>
3	<input type="text"/>
4	<input type="text"/>
5	<input type="text"/>
6	<input type="text"/>

#### 4. Number of beneficiaries

1	<input type="text"/>
2	<input type="text"/>
3	<input type="text"/>
4	<input type="text"/>
5	<input type="text"/>
6	<input type="text"/>

#### 5. Types of beneficiaries

1	<input type="text"/>
2	<input type="text"/>
3	<input type="text"/>
4	<input type="text"/>
5	<input type="text"/>
6	<input type="text"/>

6. If you have more than 6 planned activities, please provide the above information for the additional activities here.

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## 2.2 BUDGET FORWARD PLAN

Please provide your income summary for the next 12 months

## 7. Funders

BIG	
1	
2	
3	
4	

## 8. Anticipated income

BIG	
1	
2	
3	
4	
TOTAL	

## 9. Confirmed? (tick if yes)

- € BIG (yes)
- € 1
- € 2
- € 3
- € 4

## Forecast expenditure

Please provide details of your planned expenditure for the NEXT REPORTING YEAR, providing your total spending plans in the first two columns and the Big Lottery Fund's contribution to each of these in the next two columns.

## 10. Total projected expenditure for next monitoring period (including partnership funding)

1) Sports or physical activity equipment	
2) Contract staff	
3) Salaries (inc NIC & pensions)	
4) Volunteer expenses	
5) Premises costs (rent, rates etc)	
6) Travel & transport	
7) Administration costs	

8) Activity and material costs	<input type="text"/>
9) Advertising costs	<input type="text"/>
10) Professional fees	<input type="text"/>
11) Training costs	<input type="text"/>
12) Info, educ and promo materials	<input type="text"/>
13) Insurance	<input type="text"/>
TOTAL	<input type="text"/>
Total excluding equipment	<input type="text"/>

11. Total expected expenditure for next monitoring period (only Big Lottery Fund contribution)

1	<input type="text"/>
2	<input type="text"/>
3	<input type="text"/>
4	<input type="text"/>
5	<input type="text"/>
6	<input type="text"/>
7	<input type="text"/>
8	<input type="text"/>
9	<input type="text"/>
10	<input type="text"/>
11	<input type="text"/>
12	<input type="text"/>
13	<input type="text"/>
TOTAL	<input type="text"/>
Total excluding equipment	<input type="text"/>

### 3.1 Staffing and volunteers

1. How many PAID posts have been created using the BIG Lottery Fund grant?

Full time (35+ hours/week)

Part time (<35 hours)

2. How many VOLUNTEER posts have been created through Big Lottery Fund funding?

Full time (10+ hours/week)

Part time (<10 hours)

## 3.2 Beneficiary profile

This section refers to the information you have gathered in the last reporting year from your Participant Registration Form.

1. How many people have benefited directly from your project during the reporting period? (Please count each beneficiary only once)

2. If your Active Lifestyles project was not brand new when it got Active Lifestyles funding, how many people had you engaged in physical activity in the 12 months before the project started?

3. Please indicate the gender of the people who have benefited from your grant scheme during the reporting period. Enter the number in the relevant box(es):

Female

Male

4. Please indicate the age of the people who have benefited from your grant scheme during the reporting period. Enter the number of beneficiaries in the relevant box(es):

Under 16

16-24

25-44

45-64

65+

5. Please indicate the ethnicity of the people who have benefited from your grant scheme by ticking the relevant boxes below

- White
- Irish traveller
- Chinese
- Indian
- Bangladeshi
- Pakistani
- Black Caribbean
- Black African
- Black Other
- Mixed ethnic background
- Any other ethnic group

6. Please indicate how many people in the following categories have taken part in your project in this reporting year.

Socially or economically disadvantaged people

People with a life-limiting long-standing illness

Disabled people	<input type="text"/>
Older people	<input type="text"/>
People living in rural area	<input type="text"/>

7. Please indicate to which community the people who have benefited from your project mainly belong. Please tick ONE box only.

- Mainly Protestant (60%+)
- Mainly Catholic (60%+)
- Both Catholic and Protestant (neither is over 60%)
- Neither Protestant or Catholic

## 4. Declaration

Please confirm the following by ticking the boxes. If you are unable to confirm any of the following, please explain why in the box after this question.

### PUBLICITY

When you are ready to submit this form, please separately email or post two examples of the publicity you have used for our grant scheme during the reporting period that includes acknowledgement of the Big Lottery Fund's support.

### 1. I certify that:

	Yes	n/a	No
1. Our Big Lottery Fund grant has been used exclusively for the project, by our Organisation, in accordance with the details provided in the application form, subsequent documentation approved by the Fund and any subsequent changes appropriately communicated to the Fund.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. There has been no significant change to our project during the last 12 months other than those agreed by the Fund (where their permission is required in accordance with the standard conditions of grant and special terms).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Our Organisation has not received duplicate funding for this project to date.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Our Organisation has declared all sources of funding for this project to date.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Our Organisation is keeping full and proper accounts and records, including invoices, which show how the grant has been used.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Our Organisation has an equal opportunities policy that is actively implemented and regularly reviewed.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Our Organisation is following all statutory requirements and other laws and regulations relating to the project and its operation including, without limitation, adherence to employers' liability insurance; the national minimum wage; the working time directive; health and safety; child protection; data protection and intellectual property rights legislation.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Our Organisation has measures to ensure that all capital assets funded by the grant are in good repair and is taking steps to ensure their proper maintenance.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Our Organisation has arrangements in place for the safe keeping of any grant-aided equipment which, if lost or otherwise unavailable for its intended use, will be replaced as soon as reasonably practicable at no cost to the Fund.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. If part of our grant has been made to purchase, construct or improve buildings, land, property or other capital assets, including equipment and vehicles, we confirm that our Organisation has not transferred, leased or otherwise disposed of these assets without the prior written permission of the Fund.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. Our Organisation has not changed the purpose for which capital assets are used, wholly	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

or partly, without the prior written permission of the Fund.

12. Our Organisation has not used any capital assets funded by the Big Lottery Fund grant, wholly or partly, as security for any mortgage, debenture, pledge, legal charge, loan or for any other financial purpose, without the prior written permission of the Fund.

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13. Our Organisation has not assigned any part of the grant to a third party without prior written approval of the Fund.

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14. Our Organisation has provided at least two examples of the publicity we have used for our grant scheme during the reporting period that includes acknowledgement of the Fund's support.

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15. Our Organisation has provided its most recent finance statement in accordance with standard condition ALL/03/02 or ALL/03/01.

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2. If you answered "no" to any of the above, please explain why here.

## Introduction to the evaluation section of the report

The questions in this section of the report relate to the evaluation of the Community Sports Initiative, which includes Active Lifestyles and other related programmes in Scotland, Wales and Northern Ireland.

It is voluntary, but it is important.

\* You will need evidence of what you are achieving in order to make a case to future funders.

\* We will need to know what you have achieved to provide evidence of what works and what has been achieved to policy makers - who can later make it easier for you to get the funding you need to continue your work.

\* By using the same monitoring indicators across the Initiative, we can make a stronger case to policy makers about the value of your work.

Because the following questions will be used to draw together the learning consistently across the initiative, there will be some questions that will apply to everyone and that you should answer, and some which don't apply to your project, which you can leave blank.

As Active Lifestyles is about getting inactive people more active, ALL medium and large projects should be collecting monitoring data on your participants' starting level of physical activity if at all possible. We would also expect all medium and large projects to have a note of the number of coaches/activity leaders as part of their management records, so this will be easy to report.

Depending on whether you train coaches, provide sports qualifications, or use volunteers, you may have answers to the other questions in the evaluation section. If you do not, simply leave those questions blank.

Many thanks for the completing this section of the Report. Please be sure to make use of the monitoring information for your own benefit - to guide your project's development and as evidence in any other funding applications you make.

## 5.1 Physical activity - participants' starting points

The Community Sports Initiative as a whole aims to get more inactive people participating in physical activity and sport. Therefore it is important to know how active (or inactive) people were before taking part in your project. Most programmes promoting sport do not attract less active people. We need to see how your work is doing something special.

These questions refer to your total results from Q11-13 of the Participant Registration Form for Northern Ireland at [www.bigcsi.com/tools.htm](http://www.bigcsi.com/tools.htm)

The reason we ask for 30 minutes a day for 16+ adults and 60 minutes for under 16s is that is the Chief Medical Officer's report says that is the amount of regular physical activity it takes to stay healthy.

1. Please give the total of your beneficiaries' answers to Q11 on the sample participant registration form, if you work with people 16 or older. Please give number of beneficiaries for each number of days.

0 days a week	<input type="text"/>
1 day	<input type="text"/>
2 days	<input type="text"/>
3 days	<input type="text"/>
4 days	<input type="text"/>
5 or more days	<input type="text"/>

2. Please give the total of your beneficiaries' answers to Q12 on the sample participant registration form, if you work with people under 16. Please give number of beneficiaries for each number of days.

0 days a week	<input type="text"/>
1 day	<input type="text"/>
2 days	<input type="text"/>
3 days	<input type="text"/>
4 days	<input type="text"/>
5 or more days	<input type="text"/>

The following questions do NOT relate to what they were doing as part of the project but to the profile of activity in your participants' everyday life before they came along. It helps us understand the types of people that are attracted to different type of project.

For those projects collecting follow up data on this through SCNI's database, we will also be able to see patterns of how participants change their engagement in physical activity and sport as a result of different types of projects.

3. Based on answers to Q13 on the registration form, please provide total numbers of participants falling into the following categories for SPORT and RECREATION.

0 days a week	<input type="text"/>
1 day	<input type="text"/>
2 days	<input type="text"/>
3 days	<input type="text"/>
4 days	<input type="text"/>
5 or more days	<input type="text"/>

4. Based on answers to Q13 on the registration form, please provide total numbers of participants falling into the following categories for ACTIVE TRAVEL.

0 days a week	<input type="text"/>
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1 day	<input type="text"/>
2 days	<input type="text"/>
3 days	<input type="text"/>
4 days	<input type="text"/>
5 or more days	<input type="text"/>

5. Based on answers to Q13 on the registration form, please provide total numbers of participants falling into the following categories for PHYSICAL ACTIVITY AT WORK (paid or unpaid).

0 days a week	<input type="text"/>
1 day	<input type="text"/>
2 days	<input type="text"/>
3 days	<input type="text"/>
4 days	<input type="text"/>
5 or more days	<input type="text"/>

6. Based on answers to Q13 on the registration form, please provide total numbers of participants falling into the following categories for DOMESTIC ACTIVITIES (DIY, gardening, housework, etc).

0 days a week	<input type="text"/>
1 day	<input type="text"/>
2 days	<input type="text"/>
3 days	<input type="text"/>
4 days	<input type="text"/>
5 or more days	<input type="text"/>

## 5.2 Developing people and capacity

This section refers to information you may have gathered through the Coach Registration Form, Volunteer Registration Form, your management records and the CSI database if you are using it.

Question 1 below should apply to all projects. Please answer it. The other questions will apply to some projects but not others. Please only answer the relevant parts of Q2 if they apply to your project's activities. And only answer parts of Q3 below, if you chose to gather the information for your own management purposes.

All the key performance indicators (KPIs) in Q2 and Q3 are detailed in the Community Sports Initiative Monitoring Guide.

1. KPI Coaches - If you use coaches or activity leaders (including volunteer coaches, qualified or unqualified), how many have coached at least once in the reporting year?

Women	<input type="text"/>
Men	<input type="text"/>
17-24	<input type="text"/>
25-45	<input type="text"/>
Over 45's	<input type="text"/>
Living in deprived area	<input type="text"/>
Ethnic group	<input type="text"/>
Disabled	<input type="text"/>
NGB Qualified	<input type="text"/>
General Qualified	<input type="text"/>
Unqualified	<input type="text"/>
Part time paid coach	<input type="text"/>
Full time paid coach	<input type="text"/>
Volunteer Coach	<input type="text"/>
KPI Total	<input type="text"/>

2. For the Key Performance Indicators (KPIs) below that you have chosen to count, please record the total numbers you have tracked for the reporting year. If you are unsure about the definition of any KPI, please refer to your Monitoring Guide.

KPI Volunteers	<input type="text"/>
KPI Regular volunteering	<input type="text"/>
KPI Regular coaching	<input type="text"/>
KPI Health referrals	<input type="text"/>
KPI Young people at risk	<input type="text"/>
KPI Sports qualifications	<input type="text"/>

Please note that "volunteers", in Q2 above, does not count volunteer activity leaders or coaches as they are counted as Q1 above.

3. For any of the following optional KPIs you have chosen to track, please record the total numbers for the project this reporting year. If you are unsure of any KPI please refer to your Community Sports Initiative Monitoring Guide.

KPI Throughput	<input type="text"/>
KPI Active members	<input type="text"/>

KPI Organisation accreditation	<input type="text"/>
KPI Non sports qualifications	<input type="text"/>
KPI Jobs and training	<input type="text"/>
KPI Sports jobs	<input type="text"/>

### 5.3 Partnership working and integration

1. Please describe how your partners have been involved in managing or developing the project this year. Highlight any particular successes or challenges you have found with partnership working.

2. Please describe how your project is linking with local and national strategies, particularly for community and health development.

### 5.4 Progress and developments

1. Please use the following space to make any comments about your progress in achieving your outcomes. Please refer to your original aims and objectives, and compare and contrast

2. Please tell us about any unexpected results you achieved this year. Tell us what the result was, how you measured it and when you achieved it.

3. Has your project achieved more because of Active Lifestyles funding?

No

Yes (please explain)

4. How many participants do you think your organisation or project would have engaged in physical activity without the Active Lifestyles project?

5. Please describe to what extent have you been able to target inactive people.

6. Please tell us the total number of participants who considered themselves to be part of ANY minority ethnic group.

7. How many of your participants considered themselves to be "new to sport and physical activity"?

Many thanks for your time and input

Remember, please only click on "Submit completed report" when you are happy with your report because you will not be able to edit after that. If you have more changes to make, then click on "Exit this report" in the top right corner. Then when you come back to the form you can still edit what you've put into the report so far.