# Racial Equity Programme - Monitoring Form

## Example monitoring form

This form is for guidance only  
 and not for submission to Lloyds Bank Foundation.

We can only accept monitoring form submissions online, unless you have arranged   
for your submission to be made in a different format.

### Introduction

Each year, we ask all the charities we fund for a learning report to update us on their work. It’s an opportunity for you to reflect on the past twelve months and the year coming up.

Your responses are vital to the Foundation’s work – they help inform the design of future grant programmes, additional development support and our policy, research and campaign activities to champion the role of small and local charities. We also use your responses to identify case studies and gather data for our impact report.

We want you to feel able to be honest about both your successes and the challenges you face. The good news and the not so good both help to shape our work as a Foundation as well as how we use our resources to better support you.

### Report Guidance

Guidance on completing this report can be found [here.](https://www.lloydsbankfoundation.org.uk/media/sivdvixu/lbfew_monitoring_guidance_2024.pdf)

### Your charity’s details

|  |  |
| --- | --- |
| Legal name of your charity |  |
| Registered Charity/CIO number |  |
| Contact name |  |
| Email address |  |

### Section A – Your Finances

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| Q1. Please provide an update on your financial position for this year and next year.  Maximum 2,000 characters |
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| Q2. Your grant is unrestricted, but we are interested in understanding the main ways you have chosen to allocate the funding from this grant. Please select all that apply. (Tick boxes) |
| * Salary costs of existing staff member(s) * Salary costs of new staff member(s) * Premises (e.g., rent, utilities) * Frontline service provision (non-salary costs) * A new project * Capital projects * Professional services (legal, insurance, accountancy, governance support) * Organisational infrastructure (e.g., computer hardware, IT systems) * Reserves * Other (please specify below) |
| **If you have selected 'Other' in the question above, please specify.**  Maximum 5,000 characters |
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### Section B – Your Learning

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| **Q3. How many people has your charity supported during the past year?**  Please enter a number in this field without any decimal points or text. |
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| Q4. Please provide an update on the needs of the people you have supported over the past year.  Maximum 5,000 characters |
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| Q5. What have been your most significant successes as a charity over the past year?  Maximum 10,000 characters |
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| Q6. What are the most significant challenges facing your charity over the next year?  Maximum 5,000 characters |
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| Q7. What would help your charity to overcome these challenges?  Maximum 5,000 characters |
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### Section C - Feedback

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| Q8. Do you have any other feedback for the Foundation?  Maximum 5,000 characters |
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### Declarations

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| * I confirm that the grant has been applied in accordance with the terms and conditions. |
| * I confirm that we continue to work within the purpose of the grant agreement. |