**GRCF Data Collection App – Guidance for Grantees (Rounds One and Two)**

**Introduction**

This app is designed to enable projects to collect and report data on Green Recovery Challenge Fund (GRCF) activities and outputs.

The below guide provides more detail on what data projects should submit to The National Lottery Heritage Fund and how to do this via the app.

The document also details some general principles to using the app, how to get started and a guide to each page in the app.

For further information on the background to, and aims of, this app please see the ‘Monitoring Requirements for Funded Projects’ document that is relevant to the round of funding your project was awarded under. These documents contain details of the timing of reporting, which is different for each round of funding. These documents are available to view and download from the front page of the app.

**General principles**

We would hope that it is possible for projects to use this app to tell us about all of their project activity and jobs information that supports the main themes of the Green Recovery Challenge Fund (GRCF). These themes are:

* Nature conservation and restoration – improvements to the physical state of the natural environment, including making it richer in plants and wildlife.
* Nature based solutions – improvements to the physical state of the natural environment that help people and nature adapt to the effects of climate change and natural disasters.
* Connecting people with nature – a wider range of people benefit from the natural environment, including feeling more connected to the place where they live.
* Job creation and/or retention – relating to the direct employment created or sustained in order to deliver the projects and any jobs created indirectly through the supply chain, or as a result of (for example) increased visitor numbers to project sites.

In your first data return you should use the app to refine your list of project sites and record data about activities that you have completed since your project started. In future returns you should input details of any activity that has happened since your last return. Your data returns should synchronise with the time when you are reporting to your Investment Manager via the online grant management portal.

You don’t need to enter any planned or intended activities into the app.

We would encourage you to input as much data as you have available. We understand that not all projects will be able to provide data for every field – it is fine to leave sections blank. For example, where a project’s primary aim is to connect people with nature, we would not expect to see much or any data on nature conservation, but we would like to have a full set of data on activities to increase participation and engagement with nature.

The data you enter will not be used to review or monitor your project’s progress against targets, but instead aims to enable monitoring of the GRCF programme as a whole and to support learning and evaluation. You only need to tell us about what activity has taken place.

This is a new tool and we are happy to answer any queries via the dedicated support email address: [grcf\_monitoring@heritagefund.org.uk](mailto:grcf_monitoring@heritagefund.org.uk)

**Setting up your user account**

Access to the app is provided through The Heritage Fund’s systems and you will be issued specific login details for this purpose.

Please contact us via the above email address if you have any issues logging into the app.

You will have been emailed a user name (likely to be: [GRCF.Firstname.Lastname@heritagefund.org.uk](mailto:GRCF.Firstname.Lastname@heritagefund.org.uk), or [GRCF2.Firstname.Lastname@heritagefund.org.uk](mailto:GRCF2.Firstname.Lastname@heritagefund.org.uk)). You will then have been emailed a password separately. The first time you access the app you will need to enter these details and will then have the option for your browser to remember the password.

This system requires an ‘Additional Security Verification’ process. You will need to enter a phone number so you can be sent a code as an additional security measure. This can be a personal or work mobile - it will only be used for this specific purpose.

We have used Microsoft PowerApps to develop the app. The Heritage Fund has chosen to give everyone their own user accounts to make sure that projects face no additional licensing costs in accessing the application. You can have multiple projects linked to one account.

If you use Office365 already then you will need to press ‘sign in with a different account’ when you first go to access the app, then go through the process outlined above.

If you would prefer to use your existing login from your organisational account, then this may be possible, but depends on the level of licensing you already have. Please check which licence your organisation uses for Office 365 and if you’d like this option please let us know.

**Using sites – data about project locations**

Every piece of data you enter into the app will need to be assigned to a site – by site, we mean one of the locations where your project is working. This might be your head office, or the area of land where you are doing your project’s activities. Sites might be those that you own and run, partner sites, or third party sites.

This is an important part of the app, which will enable The Heritage Fund to understand where activities funded by the GRCF are taking place. For example, where jobs have been created and where trees have been planted across England.

To help make this process easier, we have already populated the app with the list of sites you provided at application. These are based on the grid references and post codes for your project.

We would recommend that your first step in using the tool is to review and amend the list of project sites. You can add, delete or edit site details. Adding a name for your sites will make navigation of the app and selection of sites much easier in the other forms.

**First data return**

For your first data return using the app, we would recommend you start using the app by taking the following steps.

**1. Site details**

Update the site details for any locations where project activity has taken place so far, including office locations.

* + Add a site name – this is a requirement. You must do this in order to add further project data.
  + Add a site type
  + Delete any sites that you will no longer be working at
  + You can also edit the above for sites where project activity will take place in the future

**2. Recording activity data**

Start by adding data on jobs - any paid roles that have been recruited so far, this includes:

* Direct project posts that have been recruited or retained (i.e. protected from redundancy) specifically for your GRCF project, by you or your partner organisations.
* Indirect posts - those funded through FCR.
* Paid apprenticeships and trainees (please tick ‘apprenticeship’ if you have any post that is a paid training role)
* Freelance posts are also entered as job roles.

Add data on the activities you have carried out so far under the following categories:

* Connecting people with nature
* Visitor infrastructure
* Nature recovery and nature based solutions

Please note that:

* This tool collects quantitative data only on your project outputs. You do not need to tell us here about activities that are partially completed or that you plan to do in the future.
* You also do not need to tell us about project management activity (such as steering group meetings or buying equipment to help you deliver you activities).
* You do not need to tell us about website visitors or communications activities.
* Financial reporting and payments will be processed for you through The Heritage Fund grant management portal.

**Later data returns**

Detailed information about timing is included in the ‘Monitoring Requirements’ document. Generally, we would expect projects to submit their data returns in line with progress reporting and payment requests that use the grant management portal.

* For projects with grants up to £250,000 you will submit at the same time as your 40% and final 10% payment requests and progress reports
* For projects with grants over £250,000 you will submit data at the same time as your quarterly payment requests and progress reports, as well as at project completion.

You can submit data at any time – you might choose to use this app more regularly and record activity as it happens.

**Updates for October 2021**

**Reporting**

Reports on data submitted to date by round one projects are available to each project. If you require an updated version, please email: [grcf\_monitoring@heritagefund.org.uk.](mailto:grcf_monitoring@heritagefund.org.uk) This reporting will launch for round two projects in the new year.

**Editing records**

You can now edit records. When viewing submitted records there is now an edit button.

* Please use this feature to correct any errors you might have made when submitting activities.
* Please continue to submit new records for activity that has been completed since your last return.
* If you have expanded on an activity previously submitted you can also make changes (for example, note an increase in participation numbers or area of land) but we would encourage the use of adding new records for new activity, using the editing function only to avoid errors or double counting.

**Trainees and Apprentices**

We have changed the wording on the form for submitting data on trainees and apprentices.

* Paid trainees and apprenticeship roles – these roles should be added using the jobs form, ticking the box for ‘Trainee or Apprentice’, and adding further detail of the qualifications they will obtain and/or the level of the apprenticeship.
* Trainees who are not in paid roles should be recorded through the ‘Connecting people with nature’ form.
* Staff and volunteer training – the forms to submit this data to us will be added in time for projects’ final data returns.

**Planned updates**

We are planning some further updates to the app on additional functionality and data fields. We will notify projects when these features become available. This includes:

We will ask for in later data returns for:

* Volunteering – number of new volunteers and volunteer hours
* Staff and volunteer training
* Indirect jobs – job roles with contractors and suppliers
* Condition for habitat and species – any changes brought about by your project, for example in the prospects for species.

**Evaluation of GRCF Round One**

For round one GRCF projects, ICF Consulting are conducting the overall programme evaluation for GRCF, on behalf of The Heritage Fund and DEFRA.

Data that you provide through the app will be shared with the evaluator to inform their analysis and reporting.

As part of their evaluation ICF will contact projects to hear your feedback on the GRCF process and to explore the potential longer term impacts of funded projects. ICF will build on the data you have already provided through the app for this process. If you have any questions about the evaluation, please get in touch with The Heritage Fund monitoring team.

We will be appointing external evaluators for round two.

**Guidance – what to find in each section**

This guidance table covers what you will find on each screen of the app, and what data you can enter.

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| **Page** | **Guidance** |
| **Home page** | This page should automatically show you the project (or projects) that you own and will be entering data for.  If not, please contact us: [grcf\_monitoring@heritagefund.org.uk](mailto:grcf_monitoring@heritagefund.org.uk) |
| **Main project landing page and site list** | The list on the right shows all locations where your project will undertake activity. This data is taken from application forms only (it does not include data from supporting documents) – specifically the grid references and post codes you provided.  Any activity you add will need to be listed against a specific site where this has taken place. You will need to make sure the site is listed before adding the data. For example, you will need to make sure that your head office is in the list of sites, before adding any jobs that are based at that address.  You can edit your site list at any time but you cannot delete a site once you have submitted activity data to it.  This page also has buttons to take you to separate forms where you can add a new site or add data about your project’s activities and job roles to a site.  **Site names** – where possible, site names have been added from application forms. If the record appears as [Please Add a Site Name] you will need to edit the site and add a name.  **Large scale projects** – if you have more than around 20 sites, we can help you to upload a list of sites, please contact us. |
| **View site details** | Click on a site in the list to:   * Delete and/or rename the site so that the list is up to date for your project. You will need to name a site so that it shows up in other forms, which will enable you to add activity to it. * Add a site type for each record. * Upload map files or GIS data shape files to better describe your site (optional). We would encourage all projects that have this data available to add it to the app, but recognise that organisations may not have GIS technology available to them.   You can also view activity and jobs that have previously been recorded against this site – there is a tab for each type of activity. You can click on records to edit their contents.  Please note that these pages provide a preview of the data you have submitted via a list of key fields, not the whole record. |
| **Add or edit a site** | You can add a new site at any time.   * You can add a site using post code, OS grid refence or longitude/latitude. Pick a central point if it’s a broad area. * Add a site type each time you edit or add a site   **Choosing a site type and boundary**   * Sites, their size, and boundaries will be different depending on the project and the type of activity or work taking place. * In some cases a site might be specific pinpoint location, such as a building or a tree. In some cases it might be a broad area, such as a nature reserve or administrative boundary. * You should add and use sites that best represent the work of your project. If you are working at lots of small sites that are close together (for example, within the same town, or along the same stretch of river), you could group these together and report against one overarching area.   **Adding GIS data – mapping and shape files**   * Please add these if you have them available. Make sure the site is saved in your list. * Click on the site, then go to the ‘Files’ tab and select ‘upload’. * Re-select the site from the drop down list (there will be blanks in the site list if you have not updated site names) and click on ‘add attachment’ * This is a new feature on the app – you may need to refresh the browser window to see files that have already uploaded. |
| **Add a job, apprentice/trainee or freelance role** | All fields (except those specific to apprenticeships and trainees) are required. This form will ask for:   * Role title * What project site it’s based at (there will be blanks in the site list if you have not updated site names) * Whether the employer is the lead / partner / they are freelance / or it’s someone else. * Full time equivalence – this would be 1 for a full time role, or if someone works on the GRCF project 1 day per week, for example, 0.2. * How GRCF supports this role – whether it’s a new role or one protected from redundancy or FCR supported * Qualification or apprenticeship level (if relevant) * Add details of all paid trainees using this form. * Unpaid training opportunities (for example, student placements) should be recorded using the ‘Connecting people with nature’ form. * **Equalities data** – information about protected characteristics. This data will help us to understand the profile of people who are employed in GRCF funded roles. In addition, we know that some projects are targeting their recruitment at specific groups and the form allows that element of their work to be recorded. We recognise, however, that it may be challenging for some organisations to collect this information and that some project leads will not have access to the records within their organisation. If you cannot provide this data please select ‘not known’. If you can supply data please note that all information collected by this app is anonymous and is only accessible by your project, the monitoring team at The Heritage Fund and the evaluator.   **Designated Homeworkers**  Please add ‘homeworker’ to the job title and use the employer’s office address as the site for this post. |
| **Connecting people with nature** | This form includes some required and some optional fields.  Required:   * Project site where this activity happened (there will be blanks in the site list if you have not updated site names) * Type of activity – free text * Number of this type of activity you have run * Total number of people engaged in this activity   Optional:   * Tick the boxes for targeting under-represented audiences and/or social prescribing if they apply * Then add more detail about the people/groups your activity is for. This is free text. For example, tell us the age group, or the specific community you are delivering your activity for.   **Online activity**  If you are running events online, list the site as the delivery organisation’s office. In activity type, make clear that this is an online event. |
| **Visitor infrastructure** | This form includes some required and some optional fields.  Required:   * Project site where this work happened (there will be blanks in the site list if you have not updated site names) * Type of work – drop down, or option for free text title * Add short title that indicates whether this is new or improved infrastructure   Optional:   * Enter number of kilometres if you’re recording the length of the work (for example, if you’ve constructed 3km of new footpath, or improved a 1km of cycle path) * You can add more detail. You do not need to include progress updates or the process you have taken, just what work you have completed. |
| **Nature recovery / nature based solutions** | This form is designed for a very broad range of project activities, including small and large scale work and capital work to support nature recovery and nature based solutions.  You should complete as much of it as you can from the data you are collecting about your project’s activities, using the fields that are relevant to your work.  This form includes some required and some optional fields.  Required:   * Project site where this work happened (there will be blanks in the site list if you have not updated site names) * Whether this work is habitat conservation, restoration, or neither * Add a brief description of the work you have done – one or two sentences. * Habitat type – there is a free text box for non- Biodiversity Action Plan (BAP) habitats. This might include urban parks, for example. * Area of land benefitting – enter zero if your work was to a single point (for example, installing a fish pass or nest box) * Whether the site is designated, and what designations it has   Optional:   * Indirect benefit – habitat connectivity or catchment benefits * Species – you only need to add this if your work is targeted at specific species * Tree planting – if you have undertaken tree planting add the number and species.   You can add multiple entries per project site – you can do this if you have undertaken three different pieces of work within one site (for example, you’ve done work on one pond, installed a nest box and planted trees within one nature reserve). |