Green Recovery Challenge Fund – Monitoring Requirements for Funded Projects in Round Two

November 2021

Introduction

This document outlines the information we would like to collect from all organisations funded by the Green Recovery Challenge Fund (GRCF) on the progress of their project's activities.

These monitoring requirements are based on those developed as part of the evaluation framework for the first round of funded projects. This development work included analysis of the overarching objectives of the GRCF; application forms and activities projects told us they were running; and consultation with funded projects.

Our aim is to develop a framework of questions that enable all projects to tell us about the work they are doing. We will use the data to report to the Department for Environment, Food & Rural Affairs (Defra) on the progress of the programme and to understand the impact of the GRCF overall. It will help everyone involved in the programme to communicate the benefits of the Green Recovery Challenge Fund and is also vital for the overall programme evaluation that is being managed by an external contractor.

Project monitoring and progress reporting

All grantees funded by the GRCF are required to participate in monitoring and evaluation of the Fund. There are three main strands to monitoring and evaluation:

- Ongoing support via your Investment Manager including submission of progress reports and payment requests via the online portal. These should continue as normal and as outlined in the 'Receiving a Grant' guidance.
- Evaluation of the GRCF programme overall – to assess the impact of the GRCF. This will be conducted by an evaluation consultancy appointed and managed by the National Lottery Heritage Fund.
- Submission of project activity and output data – to support the programme evaluation and provide Defra with updates on the overall achievements of the GRCF.

This document provides more detail on the third point – the data we would like to collect from projects throughout their delivery.

For grants of under £250k, we will expect you to submit a first data return in November / December 2021, a second return in February and then on further new activity at the time of your project mid-point progress report (at the same time as your 40% payment request), and on completion.

For grants of over £250k, we will expect you to submit data in the first return (November / December 2021), then on further new activity quarterly (in tandem with your quarterly progress reports), including on completion with your own evaluation report.

Data requirements

The table below details the information we would like to collect about project progress from all funded projects.

The table below is a framework designed to cover all projects. We understand that some areas of this will be more or less relevant depending on the type of project that you are delivering but we would encourage projects to plan to submit as much detail as they are able to.

The programme evaluation may also explore with individual projects the opportunities for deeper analysis than the core requirements presented here.

For the first data return in November / December, we would expect to see project location data, any employment data already available and potentially some early activities. We would envisage a much wider range of data being provided in later returns, when projects are further on in their delivery.

Data on individuals engaging with GRCF projects

We would encourage all projects to collect data on who is visiting their sites and engaging with their project to help understand their audiences. Our programme monitoring will not ask you to pass any personal data on participants, employees or volunteers to the Heritage Fund, however.

Instead, we will be asking you for the aggregate number of participants and volunteers in certain categories. We will also allow the bulk upload of anonymised data if that is easier for projects to provide.

Contact details

Your main contact at the National Lottery Heritage Fund will remain your Investment Manager.

If you have any queries about the evaluation of the GRCF, please get in touch on: GRCF_Monitoring@heritagefund.org.uk

Table: Data requirements

Activity and output reporting	What we will ask for	When we will ask for this
Location data • We would like to make sure we have more detailed location data than	We are using the project data that you provided at application.	**Projects over £250,00** • Quarterly, starting Nov / Dec 2021, and in final report

that provided at application stage • We will base all reporting on the data below on the location where the activity happened. **Project activities** • You will tell us what site you are reporting on, and then what has happened at that site.	The monitoring process will ask you to adjust or improve on this as needed: • GIS data is preferred if available for large sites – a shape file showing the extent and boundary of large sites. • Otherwise; OS grid reference, Lat/Long or post code, including for locations of engagement activity.	**Projects up to £250,000** • At first report (Nov / Dec 2021), second report (Feb 2022), then at the time of your mid-point progress report/payment request and final report stage
Nature conservation and restoration and **nature based solutions**		

1. Area of land benefitting from GRCF activity	• Hectares of land / habitat that has benefitted, including:
	   o Direct benefit - area of land where project activity is taking place
	   o Area of wider benefit (for example habitat connectivity or catchment-wide benefits)
	• For habitats or features not measurable in hectares, use km (e.g. rivers or hedgerows)
		Project over £250,00
		• Quarterly, starting Nov / Dec 2021, and in final report
		Projects up to £250,000
		• At first report (Nov / Dec 2021), second report (Feb 2022), then at the time of your mid-point progress report/payment request and final report stage

2. Type of land benefitting from GRCF activity	For the area of land that has benefitted: • Whether the land / habitat is protected or designated (eg. SSSI). • Type of habitat at each site. [Note –we plan to use the UK BAP Priority Habitats list, but will accept other responses for different types of site] • Condition of land / habitat – o Baseline condition	**All projects** • When entering an area of land.

	○ Condition at project completion (where possible) • [Note –where possible, such as for SSSIs, this will be the common standards here: Natural England Standard: SSSI Monitoring and Reporting -NESTND035]	
3. Type and condition of species targeted	• What species the project will target • Baseline information on species at site • Observed improvements at site at project completion (where possible)	**All projects** • When entering the area / type of land & final reports.
4. Tree planting (excluding replacement or replanting)	• Number of trees planted at each site in the reporting period (e.g. the last quarter) • Species of trees planted • [Note – we will ask for numbers of trees in addition to hectares of tree planting as in point 1.]	**Project over £250,00** • Quarterly, starting Nov / Dec 2021, and in final report **Projects up to £250,000** • At first report (Nov / Dec 2021), second report (Feb 2022), then at the time of your mid-point progress report/payment request and final report stage
Connecting people with nature		
1. Visitor infrastructure improved or installed	• Kilometres of footpath installed / improved in the reporting period (eg. last quarter) • New signage • Other infrastructure improved/installed	**Project over £250,00** • Quarterly, starting Nov / Dec 2021, and in final report **Projects up to £250,000** • At first report (Nov / Dec 2021), second report (Feb 2022), then at the time of your mid-point progress report/payment request and final report stage

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2. People engaging with project activities We do not need to collect demographic data about all visitors / participants. We would like to know about activities where you are engaging specific groups/communities based on their protected characteristics (including, for example, age, ethnicity or disability) or social and economic background.	• Number of people attending events or taking part in activities. • Types of activity (eg. citizen science, workshop, guided walk) • Whether you are targeting specific under-represented audiences (eg. yes / no + tell us more)	**Project over £250,00** • Quarterly, starting Nov / Dec 2021, and in final report **Projects up to £250,000** • At first report (Nov / Dec 2021), second report (Feb 2022), then at the time of your mid-point progress report/payment request and final report stage
3. Volunteering	• Number of new volunteers recruited • Number of volunteer days / hours • Whether you are recruiting from under-represented groups (eg. yes / no + tell us more)	
Resilience and employment		
1. Employment This will include: • Direct jobs – people employed by the grantee / a partner organisation. • Indirect jobs – for example someone employed by a contractor.	• Jobs created by GRCF (number, full time equivalent (FTE), contract length and role titles) • Jobs retained for GRCF (number, FTE, contract length and role titles) • Number of jobs supported through Full Cost Recovery (number and FTE) • Number of Kickstart placements/ jobs • Equalities data on new roles recruited (where collected) • Estimate of jobs/apprenticeships created or retained by contractors	**Project over £250,00** • Quarterly, starting Nov / Dec 2021, and in final report **Projects up to £250,000** • At first report (Nov / Dec 2021), second report (Feb 2022), then at the time of your mid-point progress report/payment request and final report stage
2. Skills	• Number of paid apprentices / trainees	**Project over £250,00**

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	for: lead applicant, partners and contractors • Age of apprentices / trainees • Title and level of apprenticeship, and/or titles of any certified course completed • Equalities data on trainees (where collected) • Number of other employees who have been trained through the project • Number of volunteers who have been trained through the project	• Quarterly, starting Nov / Dec 2021, and in final report **Projects up to £250,000** • At first report (Nov / Dec 2021), second report (Feb 2022), then at the time of your mid-point progress report/payment request and final report stage