



# Externally funded projects Monitoring Form

External Funding and Business Development Section, Development Services,  
Environmental Services Department, Council Office, High Street, Elgin, IV30 1BX

<b>Venue:</b>		<b>Date of Visit:</b>	
<b>Monitoring Visit Attendees:</b>			
<b>Name:</b>		<b>Organisation:</b>	

<b>1. Project Details</b>			
<b>Title:</b>			
<b>Lead Applicant:</b>			
<b>Delivering Agency / Sub- Contractor:</b>			
<b>Funding Sources:</b>			
<b>Contact person:</b>			

<b>2. Outline of progress</b>			
<b>Expected starting date:</b>		<b>Actual starting date:</b>	
<b>Expected completion date:</b>		<b>Actual completion date:</b>	
<b>Reason for any different dates:</b>			
<b>Implications:</b>			
<b>Actions to be taken:</b>			

<b>3. Expenditure Profile</b>				
	Approved Application	Claim to Date	Final Expected	Difference
Expenditure				
Reasons for any difference in expected & actual expenditure /grant claimed:  Implications:  Actions to be taken:				

<b>4. Project Management and Administration</b>
Are the systems to ensure the effective implementation of the project in place as detailed in the application? Detail any alterations.

<b>5. Financial Management</b>
What arrangements are there to control and monitor project expenditure? Detail any problems.

<b>6. Partnership</b>			
What role has each partner actually played in the implementation of the project?			
Partner	Funding only	Direct Activity and Expenditure	Indirect Support

<b>7. Linkages</b>
Provide details of how this project has integrated with other publicly funded projects, how this has benefited the project and what future linkages are planned.

<b>8. Publicity</b>					
Has the project fulfilled its commitment to publicise the funders contribution to this project as detailed in the application?					
<b>Signage</b>		<b>Press release</b>		<b>Logos on Workbook</b>	
<b>Leaflets</b>		<b>Launch</b>		<b>Logos on Forms</b>	
<b>Posters</b>		<b>Website</b>		<b>Logos on Documents</b>	
<b>Radio</b>		<b>TV</b>		<b>Video</b>	
<b>Exhibition</b>		<b>other</b>			

<b>9. Horizontal Themes</b>		
<b>Themes</b>	<b>Key Points of Application</b>	<b>Key Points of Achievement to Date</b>
Equal Opportunities		
Sustainable Development		
Innovation		
Other		

<b>10. General Progress &amp; Outputs/Results</b>

<b>11. General Areas for Comment</b>

<b>12. Action Points</b>

### 13. Documentation

Project:	available	Satisfactory		Action to be taken
		YES	NO	
records of tendering arrangements and contractual documentation				
details of work specifications				
details of the activity provided, together with details of who provided the project				
evidence of publicity material				
details of the management structure of the project				
details of the quality control aspects implemented				
the original evaluation documentation, e.g. questionnaires, studies, strategies, committee report				
evidence of the methods used to assess the impact of the project, e.g. how visitor numbers were recorded and assessed				
board minutes and report, progress reports				
evaluation records, including post evaluation activities needed to establish what the beneficiary is doing post project				

Staffing				
details of the staff name, their roles in relation to the project				
records of the staff, including time sheets and travel expenses				
copies of job descriptions and staff contracts				
appraisal documentation				

Beneficiaries	available	Satisfactory		Action to be taken
		YES	NO	
name, address, age, employment, gender, disability status, NI etc.				
record of the actual training and activity carried out				
the number of hours they spend on the project				
if someone leaves the project, details of why they left and what they have gone to do				
details of any payments made to the beneficiaries, e.g. child / dependant care, travel costs				

Finance				
records of both expenditure and income				
all original invoices and income documentation				
access to financial spreadsheet				
copies of annual reports				
details of the methods used in calculating apportioned shared costs				
details of the methods used in determining overhead costs				
evidence of the co-financing involved				

14. Follow up Visit	
Date:	Location:

**Signature:**

**Date:**

**Name:**

**Designation:**