

# Reporting requirements for grant recipients

Reports are an opportunity for you to share your problems and successes, and enable us to understand how your project is progressing. In addition to six-monthly interim reports during the lifetime of your grant, we would also like to receive a Final Report when your Grant Period ends. This is a chance to reflect on what worked, what didn’t and the difference that your grant-funded work has made. We use your reports in several ways, including to learn from your work, meet our own due diligence responsibilities and guide our future activities.

## final reports

This form should be completed within three months of the end of your Grant Period or by the date specified in your grant agreement letter. You will be sent the unique link before your report is due. ***This Word form is to aid your planning only, please use the online form to send us your report.***

There are four pages to this form, and you will be required to provide the following information:

* Page 1: Details about your organisation and the main grant contact
* Page 2: Grant details, achievements, learning and the future
* Page 3: Financial report
* Page 4: Additional information

You will have the opportunity to upload documents on page 4 if you wish.

You will be able to save your form to resume later. You will also have the option to review your full form before submission. Once submitted, we will send you a PDF copy of your report.

## PAGE 1

### Charity Information

|  |  |
| --- | --- |
| Organisation name: | Prefilled – confirm this is correct |
| Charity number:  | Prefilled – confirm this is correct |

### Primary Contact Information

*These are the details we hold for the main grant contact. If you are filling it out on behalf of the primary contact, you will have the opportunity to fill in your details below.*

|  |  |
| --- | --- |
| First name:  | Prefilled – confirm this is correct |
| Last name: | Prefilled – confirm this is correct |
| Job title:  | Prefilled – confirm this is correct |
| Email:  | Prefilled – confirm this is correct |
| Telephone:  | Prefilled – confirm this is correct |

### Report completed by

|  |  |
| --- | --- |
| First name: |  |
| Last name: |  |
| Email:  |   |

## page 2

### Grant details

|  |  |
| --- | --- |
| Project name or brief description of what the funding is for:  | Prefilled – confirm this is correct |
| Grant reference number:  | Prefilled – confirm this is correct |
| Total grant amount:  | Prefilled – confirm this is correct |
| Date of award:  | Prefilled – confirm this is correct |
| Grant period:  | Prefilled – confirm this is correct |

### Summary of achievements

|  |
| --- |
| **How many people directly benefitted from the work we funded?** *(100 words max)* |
|  |
| **Outputs**: **What did you deliver during this grant** **and how many were delivered over the grant period?** Here we want a list of what happened and how often. You should use quantities, e.g., 6 training sessions with 12 people in each session. 72 people in a year. *(100 words max)*  |
|  |
| **Outcomes**: **What difference has the funded project made?** Did it achieve what you hoped for? Here we want to know about what changed because of the work. You may use words like “increased” or “improved” and tell us about what impact the work has had. If your grant was awarded as part of a programme with measures of success, we will want to know how the project performed against these. E.g., X% young people reported feeling more confident after our sessions. We would like to hear about up to three outcomes. *(500 words max)* |
|  |

### Summary of learning

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| --- |
| Please tell us about any challenges encountered, how they were overcome and any key learnings you would pass on to another organisation running a similar project. Is there anything you would do differently? *(500 words max)* |
|  |

### Additional conditions

|  |
| --- |
| If your Grant Agreement outlined additional conditions, please tell us how you met these. If you struggled to meet these conditions, please let us know here. Email our team if you would like to discuss this sooner or if you’re not sure what conditions attached to your grant were. *(100 words max)* |
|  |

### The future

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| --- |
| Tell us about your organisation’s plans for the next three years. Do you foresee any challenges for your organisation or beneficiaries?Please include whether the project we funded will continue or run again. *(500 words max)* |
|  |

## page 3

### Project finances

|  |  |
| --- | --- |
| Amount of grant received to date: | Prefilled – confirm this is correct |
| Amount of grant spent to date:  |  |
| Please tell us what the grant has been spent on and highlight any significant variances from the original budget. *(100 words max)* |  |
| Was there an underspend or overspend from the agreed grant amount or original budget? Tell us about this. |  |

## page 4

### Additional information

|  |
| --- |
| We would love to see any recent photos, reports or articles or images that would help us understand what you have been up to. Please list them below with links to where we can find them or upload them. *(100 words max)* |
|  |
| Have there been any staff or operational changes that affected this grant? Let us know here if there is anything else you would like to share with us. *(100 words max)* |
|  |