

# Reporting requirements for grant recipients

Interim reports are an opportunity for you to update us on any problems or successes and help us understand how your project is progressing. We use these reports in several ways, including to learn from your work, to meet our own due diligence responsibilities and to determine whether your Grant Period or payment schedule need adapting. We would like you to report every six months during the lifetime of your grant, unless specified differently in your Grant Agreement.

We also ask for 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. This information will help to guide our future activities and we hope will be helpful reflection for you too.

## Interim reports

This form should be completed by the deadline date given in your grant agreement letter. You will be sent the unique link shortly 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 and update
* 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 |

### Project update

|  |
| --- |
| **Here you can tell us what progress has been made since your last progress report or, if it’s your first report, since the grant started.**  We want to know what work has happened (e.g., workshops, creation of materials, building work, recruitment, training), how many people have been supported (e.g., young people, parents, staff), any work that has come to an end.  Please also tell us about any surprises (good or bad!), things that have not gone to plan, delays, unexpected feedback, or interesting opportunities that you might want to discuss.  Make sure to include any specific reporting elements that we agreed at the start of the grant.  *Suggested length: 500 words. We will get in touch if we need more information.* |
|  |

### Additional conditions

|  |
| --- |
| **If your Grant Agreement outlined additional conditions, please tell us how you are meeting these.**  If you are having trouble meeting any conditions, please let us know here. Email our team if you would like to discuss the grant sooner or if you’re not sure what conditions attached to your grant are. *(100 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 so far and highlight any significant variances from the original budget. *(100 words max)* |  |
| Has your total project cost changed since you applied or last reported? If the cost has increased, how will this be covered? *(100 words max)* |  |

## 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 affect this grant? Let us know here if there is anything else you would like to share with us. *(100 words max)* |
|  |