

Guidance Note on Progress Reports

Capital Grants



A Progress Report is due six months after your grant payment.

Your Progress Report should focus on the impact of the grant awarded to you by The Henry Smith Charity. We cannot accept general reports.

Your Progress Report should include the following information:

- Confirm that the grant has been spent as originally approved by the Trustees of The Henry Smith Charity.
- Please provide details of work completed to date, work still outstanding and any changes to the original scheme.
- Provide information on how well the targets stated in the original application have been met. We are particularly interested in the impact of the project on the individuals who use your services. Please include details such as numbers of beneficiaries, etc. If the targets have not been met, please explain why.
- Describe what practical outcomes the project has produced and how it has enhanced or enabled you to develop your services. Have any useful lessons have been learned that could be of use to other charities?
- Provide details of how the project has been monitored and any evaluation of the information collected during the course of the project.
- Confirm that the budget requirements have been met, covering both income and expenditure. If they have not been met (i.e. the project ran over budget, under-spent, or encountered funding difficulties) please explain why.
- Have any problems been encountered during the project? We are interested to hear about difficulties as well as successes because valuable learning points may be highlighted.
- Tell us about any major changes or adverse developments within your organisation.

Accounts

Important: if you have not already sent us your **most recent audited accounts** please enclose them with your Progress Report.

When sending in your Progress Report, please clearly mark the envelope “PROGRESS REPORT”.