

The Henry Smith Charity

founded in 1628

Improving Lives

**Sample Progress
Report Form**

Improving Lives

Sample Progress Report Form

Your Details

Please do not attempt to fill in this form - this document is a sample progress report form and contains the Help Text that accompanies our progress report form for the Improving Lives grant programme.

Please do not use real names or information that would allow us to identify an individual within this progress report form.

Please do not use capital letters and if you are copying text from a separate document, please be sure to check that the text has copied accurately.

Organisation Name

If the name of your organisation has changed please notify us before submitting your form.

Grant Reference Number

Below are the contact details which we currently have for you.

If these details are now incorrect, or if some information is missing, please contact your Grants Manager.

Main contact details

These are the main contact details we have for your organisation.

Address

Postal Code

Your Organisation

1. Has anything changed in your organisation since your grant was awarded? How has it affected your work? (300 words)

Please see the terms and conditions of your grant for further details on the type of organisational changes which you must report to us.

2. What successes has your organisation had in this reporting period? (300 words)

3. What changes have there been in your local area/ community/ sector and how has it affected your work? (300 words)

Your Grant

You were awarded a grant:

Grant Amount (£)

Project Start Date

Project End Date

1. How many people have been helped in this reporting period?

2. How many unique individuals have been helped since your grant started?

3. How much of your grant have you spent to date?

4. Do you expect an underspend after 12 months of the current year of your grant?

As your reporting period is 10 months' in to your annual grant, we understand that you will not have the final expenditure figure for the full grant year at this point so you will be estimating the last 2 months'.

If yes, how much is the underspend?

What are the reasons for the underspend? (200 words)

5. Please tell us about the activities delivered and any changes to what was planned. (300 words)

6. Please tell us about someone who has used your service/s and what happened as a result. (300 words)

Do not use real names or information that would allow us to identify an individual.

Your Outcomes

During the application process, it was identified that your project was working towards one or more of our priority areas for our Improving Lives programme. The priority area(s) identified for your work are listed below.

If your work is only addressing one priority area, only 'Improving Lives Priority 1' will be shown.

Improving Lives priority 1

Improving Lives priority 2

Improving Lives priority 3

1. With reference to the outcomes agreed in your grant offer letter, and for the priority area(s) addressed by your grant, please tell us how many people have achieved the outcomes you described in relation to the priorities you are working towards and how you measured the changes made.

The priority areas addressed by your grant are listed above. Please only complete the boxes below which are relevant to the priority area(s) your grant is addressing.

Help at a critical moment (300 words)

Positive Choices (300 words)

Accommodation / Housing Support (300 words)

Employment and Training (300 words)

Financial Inclusion, Rights and Entitlements (300 words)

Support Networks and Family (300 words)

Financial Information

Please note, once you have chosen the file you want to upload using the 'choose file' button, you must click the 'upload' button to attach the document. If you do not do this, the file will not be attached.

1. Please attach a copy of your most recently published Statutory Accounts.

2. Please attach a budget update covering both income and expenditure and highlight any adjustments or changes to the original budget.

3. In pounds (£), how much does your organisation have in reserves?

We calculate your reserves as your net current assets plus investments.

4. Over the next 12 months, do you expect your financial position will be the same, better or worse?

Please explain your answer to question 4 above. (100 words)

5. Please tick this box if your bank details have changed since we made your last payment for your grant.

If you indicate that your bank details have changed, your next payment will be held until we have received a new bank statement from you in the post.

You must send us an original bank statement (or a copy signed and dated by two Trustees), which is no more than 3 months old. This statement will be copied and the original returned to you. If you are not able to send a recent bank statement, please send an original letter (not a copy) from your bank verifying your Sort Code, Account Number and Account Name. On receipt, we will ensure that your details are stored securely and will inform you by email when a payment has been made to you.

Additional Optional Questions

1. Is there anything else you would like to tell us about? (100 words)

2. Do you have any feedback for us? (100 words)

Confirmation and Authorisation

Data protection Statement

We shall process all personal data provided to us for the purposes of assessing your application, managing or monitoring any grant awarded and any related administration or research purposes in accordance with our privacy policy, a copy of which can be viewed [here](#).

Third party data

No personal data concerning third party individuals should be included within your progress report form without their explicit knowledge that their information will be shared with the Henry Smith Charity and potentially other grant makers, and their written consent; below you will be asked to confirm this before the progress report can take place (or alternatively 'be made', or 'accepted').

Any additional excessive personal information will not be considered and immediately deleted. Can we please therefore ask that you do NOT include details of named or identifiable individuals, for example, their job title, connection to your organisation, physical attributes or other descriptions, either in details of beneficiaries aided, case studies provided, or in any other information. Should you have particular reasons why such information should be provided to us, please contact us before sending us the information.

Collaborating with other Grant Makers

We reserve the right to disclose non-personal information, regarding your progress report, activities and organisation, with other grant makers unless you expressly request otherwise. No personal data will be shared with other grant makers for this purpose.

Detection of fraud

We reserve the right to share personal information to detect and prevent fraud and do not require your consent.

I confirm that, to the best of my belief, all information provided in this progress report form is true and correct and I am authorised to submit this progress report form on behalf of the organisation.

I confirm that the written agreement and permission (to pass their personal information to the Henry Smith Charity) for all individuals identified in our progress report form has been obtained.

Please confirm the full name of the individual who completed this progress report form.

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