# Annual Report

We require that you report annually on your grant from us. Below is a template outlining how you can summarise your progress, details of the evidence you have gathered, and the lessons learned so far. This report must be accompanied by a financial report and audited accounts.

***Please note that your next grant instalment will be released once we have read and approved your report****. Your report should be submitted with a financial report detailing actual v forecast expenditure and your latest set of audited accounts. You must allow six weeks from your report submission to receiving your next tranche payment. We will not prompt you for your annual report.*

|  |  |
| --- | --- |
|  | **Organisation and Grant information:** |
| **a.** | **Name of Organisation:** |  |
| **b.** | **Name and position of person completing the report** |  |
| **c.** | **Date Report Completed:** |  |
| **d.**  | **Amount and purpose of the grant:** |  |
| **e.** | **Grant Manager:** |  |

**Please ensure that you link questions 2 and 3 to any outputs and outcomes you listed in your original concept.** **You may answer in bullet points**

|  |  |
| --- | --- |
|  | **Describe how this grant has been strategically significant to your organisation** |
|  |

|  |  |
| --- | --- |
|  | **Have there been any unexpected outcomes? If so, please tell us about these** |
|  |

|  |  |
| --- | --- |
|  | **How do you propose to meet the costs this grant covers in the future – beyond the life of this grant?** |
|  |

|  |  |
| --- | --- |
|  | **What lessons have you learnt from your work so far and how are you using this learning? This can relate to your programmatic/policy work.** |
|  |

|  |  |
| --- | --- |
|  | **Have there been any organisational or external factors, which have led to changes to your work or are likely to have an effect on the next phase of your work? e.g. staff changes, premises, funding, changes in government policies** |
|  |

|  |  |
| --- | --- |
|  | **Please feel free to give us any other information that you consider is relevant and of interest.** |
|  |

There is no set rule as to how long the report should be, but normally we would expect between two to four A4 pages.

The information you provide is summarised and presented to our Trustees. It also helps us to learn from the work and to apply this to our future funding decisions, where appropriate.

We will provide feedback on your report and may want to know more about some of the points you make. If this is the case, we will follow up by email or phone.

Please do not hesitate to contact us if you have any questions.