

Shout! Fund

Progress Report

Word Version

Henry Smith Foundation only accepts reports via an online portal. The links are on our webpage. This template is a downloadable Word version to help you prepare your report. **You can not submit this version**.

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# Welcome

We want to make it easy for you to report, so here are some tips to get you started:

* You can download a sample report from our website to help you prepare your report. You can add your colleagues to work on the same report by clicking "**Manage Applicants**" in the top-right corner. You can find step-by-step guidance [here](https://webfiles-sc1.blackbaud.com/files/support/helpfiles/grantsconnect/content/gc-applicants-collaborators.html).
* When you see '**\***' next to a question, it is **mandatory**.
* You can change the **size of the text boxes** to see the entire text. You do this by left-clicking on the symbol in the bottom right corner and dragging the box until it is the size you want. We ask you not to include **diagrams or tables** when answering the questions. They will not be included when you submit your form.
* Throughout the form, we ask that you **avoid using real names** or information that could identify individuals other than the main contact(s).
* The form **saves** your work automatically as you work, so you can start the form and continue another day as needed.
* When answering questions concerning lived experience and your organisation, ensure you **do not provide information that could be used to identify individuals and their lived experience**. For this report, we do not need to, or want to, collect information about individuals and their lived experience. We ask that you avoid using names, job titles or other references to individuals or groups of people that would make it possible to identify them, or enable speculation about their background and life experiences.

# Your Progress Report

In this tab, we will ask you questions regarding finances and safeguarding.

## Your call with your grant manager

Each year, we’ll arrange a call with you to hear how things are going. These conversations help us understand the difference your work is making and how we can improve the way we fund.

We’ll use this time to talk about:

* The progress and impact of your work so far
* Any successes you’d like to share
* Any challenges your organisation or the people you support are facing

Your responses in this progress report will help shape the conversation.

1.1 Have you booked in a call with your grant manager?\*

Select from drop-down

**If you select no, you will be asked to book a call in with your grant manager:**

You can book in your call with your grant manager by clicking this link here.

If the above link does not work, or if there is limited availability, please send us an email at buildingindependence@henrysmith.foundation

## Your bank details

1.2 Have your bank details have **changed** since we made your last grant payment?\*

Select from drop-down.

**If you select yes, you will be asked to give us a new bank statement:**

Upload a bank statement or other appropriate third-party report.\*

This new document should:

* Be no more than 3 months old
* Clearly display your banking details:
	+ Account name.
	+ Sort code.
	+ Account number.

You can only add one document; if you add more than one document, only the latest document will be submitted.

We will ensure that your details are stored securely within a locked system.

Upload document

## Your finances

1.3 Upload your organisation’s most recently published, signed, audited or independently inspected accounts. If your accounts are over 10 months old, upload your draft or management accounts.\*

Along with your report, we also read publicly available information. This includes annual reports, impact reports, audits, regulatory websites, and stories on your website and social media. Feel free to reference these documents in your report, even if you are not asked to attach them.

You can only add one document; if you add more than one document, only the latest document will be submitted.

Upload document

1.4 Do you expect to have any of this year’s grant instalment left unspent by the end of the reporting period?\*

As you're 10 months into your reporting period, we understand you don't have final spending figures yet. We ask that you estimate the expenses for the last two months.

Select from drop-down

**If you select, you will be asked to give us more information:**

How much of this year’s grant do you expect will be unspent by the end of the reporting period?\*

£

Will more than 10% of this year’s grant remain unspent at the end of the reporting period?\*

Select from drop-down.

Tell us why some of the grant will remain unspent, and how you plan to use the remaining funds.\*

This is not a problem, and we know that plans can shift. Your grant manager will already be planning to discuss this with you on your upcoming call, but it’s helpful for us to have this information in advance

Max 300 words.

## Your safeguarding processes

1.5 Have you experienced any [Serious Incidents](https://www.gov.uk/guidance/how-to-report-a-serious-incident-in-yourcharity) (England/Wales/Northern Ireland), or any equivalent events in Scotland, over this reporting period which you have not previously shared with us?\*

We ask this to help us understand the challenges for your organisation.

Select from drop-down

**If you select yes or maybe, you will be told that one of our safeguarding leads will be in touch to ask for a brief summary of the event/s after the report has been submitted.**

# Other and Submit

In this final tab, we will ask you to answer some optional questions. Before submitting, you will also be asked to agree to our data protection statement.

##  Additional information

2.1 Is there anything else that you would like to tell us about?

Max 300 words.

## Your feedback

2.2 Do you have any feedback for us?

Max 300 words.

## Data protection

2.3 Do you agree with the below statements?\*

- I have read and agree to the Data Protection Statement

- I have received permission to share the personal information of all individuals named in this form

Select from drop-down

**Henry Smith Foundation Data Protection Statement**

We process all personal data provided to us in this form 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.](https://www.henrysmithcharity.org.uk/privacy-policy/)

**Third party data**

No personal data concerning third party individuals should be included within your form without their explicit knowledge, and informed consent, that this information will be shared with the Henry Smith Foundation and potentially other grant makers.

Before submitting this application, ensure you have not included any personal details or other information that could be used to identify people with relevant lived experience in your organisation.

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 apart from key contacts, 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 application, activities and organisation, to 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.