

Together We Begin Fund

Progress Report

Word Version

The 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**.

The report is divided into the following sections:

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# Welcome

We want to make it easy for you to submit your report. Here are some tips to get you started:

* You can download a **sample report** from [our website](https://henrysmith.foundation/grants/together-we-begin/#resources) to help you prepare your report.
* You can **add your colleagues** to work on the same form by clicking "Manage Applicants" in the top-right corner. You can find a step by step guidance [on grantsconnects website](https://webfiles-sc1.blackbaud.com/files/support/helpfiles/grantsconnect/content/gc-applicants-collaborators.html).
* You can **change the owner** of this form by clicking "Manage Applicants" in the top-right corner.  You can find a step by step guidance [on on grantsconnects website.](https://webfiles-sc1.blackbaud.com/files/support/helpfiles/grantsconnect/content/gc-applicants-collaborators.html)
* If you want to **change contact** for this grant contact us. You can find the details[on our website.](https://henrysmith.foundation/contact-us/)
* When you see '**\***' next to a question, it is a **mandatory question.**
* 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.
* If there have been **any updates** to your organisational nameor information, please let us know. You can find the details [on our website.](https://henrysmith.foundation/contact-us/)

## Your Grant

Grant given too

Pre-populated

Start date

Pre-populated

End date

Pre-populated

Grant awarded

Pre-populated

Total grant amount

Pre-populated

Reference number

Pre-populated

# Your Organisation

In this section, we want to know if your payment details have changed, what your finances look like and if you had any safeguarding incidents.

## Your finances

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

Select from drop-down

**If you select yes:**

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

Ensure that the document is no more than 3 months old and clearly sets out your banking details - Sort Code, Account Number and Account Name.

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

Upload document

1.2  Upload your organisation’s most recently published, signed, audited or independently inspected accounts.\*

If your accounts are over 10 months old, also 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.

Upload document

## Safeguarding

1.3 Have you experienced any[Serious Incidents](https://www.gov.uk/guidance/how-to-report-a-serious-incident-in-your-charity)(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

# Your Grant

In this section, we ask that you tell us about how many families you have worked with and if you have any underspend.

## The activities

2.1 How many families have you worked with?\*

In this reporting period.\*

Since the start of the grant.\*

## The budget

2.2 At the end of the full 12-month reporting period, do you expect an underspend for this year?\*

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

Select from drop-down

**If you select yes:**

Is the underspend expected to be more than 10% of this year’s budget?\*

Select from drop-down

**If you select yes:**

What caused the underspend and how do you plan to use the remaining funds?\*

Your Grant Manager will reach out to you to discuss and approve the suggestion if this has not happened before this report. If you need to extend the funding period to spend this money, let us know the new proposed end date to consider.

Max 200 words.

**In the Year 2 report only:**

2.3 Would you prefer a call or visit?\*

We will take your preference into consideration however whether you receive a call or visit will be based on Henry Smith Foundation staff capacity.

Max 50 words.

# Other and Submit

In this final tab, we ask that you answer some optional questions to help us learn and improve. Before submitting, you will also be asked if you agree to a Data protection statement.

## Additional information

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

Max 300 words.

3.2 Do you have any feedback for us?

Max 300 words.

## Data protection

3.3 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

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.