**Improving Lives:** Final Report

- Word version -

Henry Smith accepts reports and applications 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 these sections:

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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.
* 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.
* You can find frequently asked questions for this grant programme on our website.
* 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.

# Your Organisation

In this section, we invite you to share more general information about your organisation.

## Your community and organisation

1.1 What changes have happened in your local area, community or sector in this reporting period?

Include how these changes have impacted your work.

Max 300 words.

# Your Grant

In this section, please tell us how the project went in the last year and update us on any changes.

## The activities

2.1 Since the start of this grant, how many individuals and/or families have you worked with?

If you reached fewer individuals and/or families than you expected: Tell us more

Explain why you think that reach was less than expected.

Max 150 words.

2.2 Since the start of this grant, did you start working with new communities or groups of individuals?

For project grant: Within this project

For running cost grant: For the full organisation.

Select from dropdown

Options: Yes or No

[If 2.2 is yes]

Tell us more.

Explain what caused the change and what support you provided.

Max 150 words

2.3 Summarise how the activities delivered have helped the individuals, families and/or communities you work with.

Max 300 words

2.4 Describe the activities that did not go as planned and any changes you made. In hindsight, what lessons did you learn from these adjustments?

Max 300 words.

## The Outcomes

The outcomes identified for your grant were:

If you have questions about these, reach out to your Grants Manager.

This is populated from your offer letter

2.5 Share three main outcomes you achieved from the ones listed above. Include how many individuals and/or families benefited during the entire grant period.

Max 600 words.

2.6 How has your monitoring system helped capture the outcomes data mentioned above?

Looking back, would you have chosen different methods? If so, please list those methods and explain why.

Max 150 words.

## The Finances

2.7 Has the grant been spent in full?

Select from Drop-down

Options: Yes or No

[If 2.7 is Yes]

What is the underspend?

2.8 Upload the actual budget figures showing both income and expenditure. Highlight any changes made to the original budget.

You can only add one document, if you add more than one document only the latest document will be submitted. See examples and guidance here.

Upload document

# Safeguarding

3.1 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.

Options: Yes, No and Maybe

# 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.

## Feedback

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

Options: Yes or No

**Henry Smith Charity Data Protection Statement**

We process all personal data provided to us in this form for the purposes of assessing your report, 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 form without their explicit knowledge, and informed consent, that this information will be shared with the Henry Smith and potentially other grant makers.

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.