

THE EQUITABLE CHARITABLE TRUST

Progress Report Guidelines for grants of more than one year

It is a condition of funding that all organisations submit a Progress Report at the end of each year of their grant. With each report you send us, you should also include a copy of your organisation's most recent audited annual accounts.

We ask that you complete our Progress Report Questionnaire, as well as producing a text-based account of your project. The format and length of your report is up to you and will vary depending on the type of project you received support for. Usually a few sides of A4 is sufficient.

In your report you need to tell us how your project is progressing, what it has achieved during the year, whether it encountered difficulties and, if it did, what these were and how you dealt with them. Although it is always great to hear about an organisation's or project's successes, we are keen to receive honest and constructive reports about the projects we are funding.

Please ensure that the following information is included in your report:

1. Confirm that the grant has been spent on the purpose awarded. If not, please explain.
2. Details of how the project is being monitored and evaluated, and the results of this to date.
3. Information about to what extent the project is meeting the targets or aims that were outlined in your application. If the project has encountered difficulties during the year or has not meet its targets, please explain why and how the experience will inform future work.
4. The number of children and/or young people that have benefited from the project or services funded by our grant.
5. Information about what stage the project is at now and, if we are not meeting all its costs, a list of the other funders involved in the project.
6. If the grant is for a salary, please provide information about how the post is benefiting your organisation and its activities.
7. Whether or not the project is on budget. If not, please comment on this.
8. A financial breakdown of how the year's grant has been spent.

NB: A Final Report will be required at the end of the final year of your grant instead of a Progress Report. A separate guidance note provides information about Final Reports, although the report format is unlikely to need to be very different to that outlined above.

**Please remember to also send us your Progress Report
Questionnaire and your organisation's latest Audited Annual
Accounts with your Progress Report.**

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Progress Report Questionnaire

Organisation Name			
Project Name			
Grant Amount	£		
Length of Grant		Grant Reference	

What type of grant are you in receipt of?

(tick as many boxes as apply)

- Project (Revenue)
 Capital or Equipment
 Salary for a post
 Other (please specify)

What type of project are you delivering?

- Education for disadvantaged children and/or young people
 Education for disabled children and/or young people

How many children and/or young people has the project involved/benefited this year?

- 0-25
 26-50
 51-100
 101-200
 201 +

Where does your project operate?

- Locally
 Regionally
 Nationally
 Overseas

To what extent do you feel your project achieved its aims and objectives this year?

- Not at all
 Partly
 Largely
 Fully

Overall, how successful do you feel the project was this year?

- Not at all
 Partly
 Mostly
 Totally

Has receiving a grant from the Equitable Charitable Trust helped you to lever in/raise funding from other sources?

- Yes
 No

If Yes, which type of funder(s) or organisation(s) have provided partnership funding for the project?

- National Charitable Trust or Foundation
 Local or Regional Charity
 Local Authority
 Partner organisation
 European funding (e.g. regeneration funds)
 Individual
 Other (please specify)

Name of Person

Completing the Form..... Date

You should complete this questionnaire at the end of each year in which you receive a grant (up to but not including the final year) and send it to us with your Progress Report and audited Accounts. This questionnaire is important to us as it helps us monitor the effectiveness of our grants. Thank you.