

## **GRANT PROGRESS REPORT**

1. The purpose of our Grant Progress Report is to monitor the way that the award made is helping the beneficiary organisation deliver the work for which the original application was made. We regard this as a learning process for ourselves and the beneficiary organisation. Consequently, while we are pleased to see statistical data it is only of value to us if it contributes to an understanding of trends, changes or lessons (both good and bad) arising from the delivery of the work.
2. A Report is to be made by the beneficiary organisation to the Trust within four weeks of the end of the grant. As part of our Terms and Conditions, all grants must be followed by a progress report. In the case of multi-year grants, the report is the trigger to pay the next instalment. Any delay in submitting reports simply defers future grant instalments.
3. Reports should be written in Ariel 11 black text and can be a maximum of six sides of A4 but ideally should not exceed four sides. Notes on how to answer the questions can be found below.
4. Reports can be sent by e-mail to: [director@watesfoundation.org.uk](mailto:director@watesfoundation.org.uk).
5. A copy of your most recent signed Annual Report and charity accounts should also be sent to the Trust by email. We expect that accounts will be compliant with SORP and audited or independently examined as required by the Charities Act or Charities (Accounts and Reports) Regulations.
6. Should you need clarification of any question, please do not hesitate to telephone the Trust's staff.

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**WATES FAMILY ENTERPRISE TRUST  
GRANT PROGRESS REPORT**

Name of your organisation.

Nature of funded project or programme and its objective(s) stated in the original application.

Period covered by the Report.

Amount of the grant in this period and how it was spent.

**NOTE:** *[Say how you have spent the most funding payment, mentioning any underspend where appropriate.]*

What activities have taken place and what outputs did these generate? Were particular milestones passed?

**NOTE:** *[Describe how the work is being delivered and the numbers taking part, types of activity or service and any particular major events.]*

How are you involving those you aim to help in the delivery of the project?

**NOTE:** *[Identify any tools such as user groups, consultations and surveys or employment of former clients as staff or volunteers.]*

How is the work in the reporting period making a difference to your beneficiaries?

**NOTE:** *[Identify the differences, changes or results that have become apparent from the work so far.]*

How are you measuring the success of the work? Please provide statistics and case studies where appropriate.

**NOTE:** *[Describe the monitoring and evaluation methods that lead you to conclude that change is taking place.]*

What measures are in place to ensure that what you do is of good quality?

**NOTE:** *[Quality assurance schemes such as QISS, QUAD, PQASSO, or Investors in People, and training and accreditation gained by participants, volunteers or staff, for example, NVQs, Open College Network or umbrella organisation accreditation.]*

What public benefit is the proposed activity meeting?

**NOTE:** *[Identify the public benefit(s) of your proposed activity, in line with the requirements of the Charities Act 2011.]*

**[If applicable]** Our Annual Report and Accounts is being sent by post.

Name of person completing Report: .....

Position held: .....

Date: .....