

## **GUIDANCE ON COMPLETING THE INVEST GRANT REPORT**

### **Accessing the report**

The grant report is provided through your Lloyds Bank Foundation account, which can be accessed through our website: [www.lloydsbankfoundation.org.uk](http://www.lloydsbankfoundation.org.uk)

You will be able to open, work on and save the document until you are ready to submit it. You can also email a draft copy to colleagues for comment.

Once submitted the document will be locked and no further changes can be made.

### **Completing the Report**

The form is broken down into five sections for you to provide:

1. Information on how you have spent the grant
2. Information on how the work the grant is funding is progressing
3. Data on beneficiary outcomes you have helped achieve
4. Data on the number of people supported
5. A feedback section for you to tell us about changes your charity is experiencing, how our support has helped you and how we can improve our support

You need to complete all sections in order to submit the report.

Some of the sections of the report will be pre-filled with information about your grant that is taken from your application form.

#### **Section 1 – How our grant was spent**

Please report the actual expenditure against the budget requested. If you have money left over please tell us why this is and how you intend to use the funds. Do you need the period of the grant extended or are some things costing less than expected and others more so you need to adjust your budget for the following year. If you are overspent we are not able to increase your grant.

#### **Section 2 – How is the work we are funding progressing**

This section will be pre-filled with the objectives you submitted in your application form. For each objective please tell us how the work to achieve the objective is progressing. This should include reporting back the numbers of beneficiaries engaged in the related activity.

### Section 3 – Data on beneficiary outcomes

Against each of the **Transition Outcomes** you indicated on your application what you expected to achieve – you need to provide a number for:

The number of individual people **engaged** to achieve the outcome. Eg: you may have provided 50 people with help to get accommodation but only 30 achieved this. You engaged with 50 people.

The number of individual people that **achieved** the outcomes. Ie: the 30 people who were able to secure accommodation as a result of your support. You should have monitoring systems in place to enable you to provide this information.

Against each of the **Progression Outcomes** you indicated on your application what you expected to achieve, you need to provide a number for:

The number of individual people **engaged** to achieve the outcomes and the number of individual people that **achieved** the outcome. This should be on the same basis as above.

Please complete the information by telling us:

If there is anything you may need to revise for the following year as the targets you set yourself are proving challenging or being overachieved.

Please can you also report on the particular successes and challenges of the work we funded.

**Case study** – if you are able to provide a suitable case study to illustrate the impact of the work we are funding you can do so here. If you do not wish to provide a case study please write NONE. *You can also provide a case study by attaching as a separate document when you are ready to submit the report.*

### Section 4 – Number of People

This section requests information about the numbers of people your charity and our grant is helping and information about what proportion of your come our grant represents. If you receive income from statutory sources such as local Councils, Health Services or from Government Departments please can you also provide the relevant information requested. This should include both grant and contract income from public service contacts.

## Section 5 – Feedback Section

The Foundation aims to collect information that informs its wider work and this includes representing and supporting small and medium charities. Please can you provide responses to the questions about demand for your services, the challenges the charity faces and what support would help. It includes a section on **Enhance**. If you have received support under the Enhance programme, please can you provide feedback on this to help us develop and improve the support we offer. At the end of this section there is a box where you can provide general feedback.

Thank you for taking the time to complete the report.