**GRANT REPORT**

We ask all grant holders to report on the delivery of the outcomes related to your grant on an annual basis. The form is broken down into six sections for you to provide:

1. Information on how you have spent the grant
2. Data on the number of people who have benefited
3. Information on the benefits of the work funded by the grant
4. Lesson learnt from the work funded by the grant
5. Information about your charity relevant to the work funded by the grant
6. Feedback section for you to tell us what has been good about the Foundation and what we could do better so we can improve our support

If you are already reporting this information in a different template, with prior approval from the Foundation we may be able to accept your existing report template.

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| **Charity name** |  |
| **Grant reference** |  |
| **Purpose of grant** |  |
| **Total value of grant** |  |
| **Value of grant for this report** |  |
| **Grant period covered by this report** |  |

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| --- | --- | --- | --- |
| 1. **Grant Expenditure**   Please report on your actual spend compared to your budgeted spend.  Where applicable please give the reason for the difference.  You may insert rows for additional expenditure items. | | | |
| **Item** | **Actual** | **Budget** | **Reason for difference** |
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|  |  |  |  |
| **Total** |  |  |  |
| If you have an underspend, we may agree to you using this for a different purpose.  Please tell us how it came about and how you intend to spend it. | | | |
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| 1. **Number of people who have benefitted**   The planned number is what you included in your grant application.  You may insert rows for the different types of people who have benefited. | | |
| **Brief description of people who have benefited** | **Actual** | **Planned** |
|  |  |  |
| 1. **Please tell us** **the benefits of the work funded by the grant**   The three expected outcomes are those listed in your grant application.  Please explain what has been achieved. | | | |
| **Outcome 1: [insert expected outcome]** | | | |
| **Achieved:** | | | |
| **Sources of information** *[Eg survey of service users; interviews with volunteers; attendance records]* | | | |
| **Outcome 2: [insert expected outcome]** | | | |
| **Achieved:** | | | |
| **Sources of information** *[Eg survey of service users; interviews with volunteers; attendance records]* | | | |
| **Outcome 3: [insert expected outcome]** | | | |
| **Achieved:** | | | |
| **Sources of information** *[Eg survey of service users; interviews with volunteers; attendance records]* | | | |
| **Narrative Summary of the Achievements and Impact**  Please tell us what you have achieved and the impact the grant has made to the people you support or how you have strengthened your charity to deliver more effectively | | | |
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| **What have been the successes of the work we funded in the last year** | | | |
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| **What have been the challenges of the work we funded in the last year** | | | |
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| 1. **What has your charity learnt from the work we funded in the last year?**   This could relate to planned information-gathering about the people you support, or specific lessons about implementing your work more effectively, or unintended outcomes that resulted from the work. |
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| 1. **Other Information**   Are there any matters we should know about concerning your charity or the work we funded  e.g. are you aware that any part of your funding has been misused, have your auditors flagged any serious issues with your charity’s accounts, has your charity experienced any safeguarding issues |
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| 1. **Do you have any feedback for the Foundation?**   We are committed to learning from our grant making and continual improvement is central to the process. What has been good about the Foundation and what could we do better? |
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For grant holders who have further grant payment(s) scheduled, please attach:

1. Latest audited annual accounts
2. Recent bank statement

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| --- | --- |
| **Contact name** |  |
| **Position** |  |
| **Date report submitted** |  |

Please return the grant report to Executive Director

Email: [jlepoidevin@lloydsbankfoundation.org.uk](mailto:jlepoidevin@lloydsbankfoundation.org.uk)

Phone: 01481 706360

**THANK YOU FOR COMPLETING THE REPORT**

**THE PURPOSE OF PROVIDING THE INFORMATION IN THE GRANT REPORT**

The report will be read by the Executive Director and a sample by Trustee(s) of the Foundation.

The report will be used to determine whether the grant holder achieved the intended outcomes and impact as outlined in their grant application.

The report will capture grant holders’ successes and challenges which will help to inform grant decision-making and provide useful intelligence on successes and challenges in the sector.

The report will help the Foundation to learn from its grant making and make continual improvements.