

## Reporting Guidance Notes

*For Grants of £5,000 or more per annum\**

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At the end of each year of your grant, we will ask you to complete an End of Year Report telling us how you have progressed against your agreed outcomes and activities.

### How we will use the information you provide

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We will use the information in your report to see how your project is progressing and to find out what you have achieved and what difference you have made. If your work is progressing in line with your outcomes and activities, we can then release any further payments to you.

We will also use the information in your report for our own evaluation purposes. We want to know what difference our funding is making to people and communities facing disadvantage. We want to learn from the projects we fund to find out what approaches work well in tackling identified needs. We will share this information with our staff and Trustees and, from time to time, may also share information externally, with other funders, third sector organisations and statutory bodies. Reports may also help us to identify common themes and trends in the sector that will help us to develop the support we are able to provide to organisations.

### How to complete a report

We want the process of reporting to be as useful for you as it is for us. We hope that the process of reporting on your work will give you the opportunity to think about your work and reflect on the progress you have made. Ideally, the report should be a summary of information that you are already collecting for your own purposes, rather than information that you feel you specifically need to gather just to complete a funder's report. We are also keen to hear about any challenges that you have faced as well as the things that have worked well for you.

In reviewing your report, we will be looking out for the following:

- Evidence that you have delivered the activities that you said you would and have met any targets you have set around this
- Evidence that you are progressing towards your outcomes
- A range of methods, data sources and perspectives (e.g. services users, staff, partners etc) you have used to build your evidence and illustrate your points (**see our [tools and resources guide for further info](#)**)
- If you can show how change happened, and explain how you contributed to it (i.e. there is a clear link between the activities you ran and the outcomes that have occurred)
- That the report itself answers the questions set out in the template
- If you have used the evidence to reflect on your own progress and learning, and what this means for future work

Please refer to our resources on [Evidencing Your Impact](#) to help you with this.

You may find our [sample report](#) useful in helping you to complete your End of Year Report.

*\*If your grant is for less than £5,000 per annum, we will not ask you to report back to us at the end of your grant year, unless we agree with you otherwise at the point of award.*

## What do you need to do?

Towards the end of your grant year, around 2 months before your next payment is due, we will email you a link to your online end of year report. This report will be pre-populated with the outcomes and activities that you agreed with us the previous year.

If you have your own reporting format which you feel will provide us with the information we need without you having to re-write it in our form or, if you are submitting a report to another funder for the same work, we may be able to accept your report in this format. Please contact [funding@therobertsontrust.org.uk](mailto:funding@therobertsontrust.org.uk) to discuss this.

\*This applies if you have received a grant of over £5,000 per annum. If your grant is for less than £5,000 per annum, we will not ask you to report back to us at the end of your grant year unless we agree with you otherwise at the point of award.

## What you need to provide

### End of year report

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1. **An online End of Year Report** showing that you have achieved or made good progress towards the outcomes and activities that you set at the beginning of the year.

Within the report, we will also ask you to provide **Outcomes and Activities** for the coming year. For help on setting your outcomes and activities, please refer to our [Guidance Document](#).

2. **A copy of your organisation's most recent audited/independently examined annual accounts.**

Any future payments are dependent on a satisfactory review of this information.

### End of Grant Report

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When you have reached the end of your grant and no further payments are due, we will ask you to complete an End of Grant Report. We will email you a link to your online form when your final grant year has come to an end.

You will find guidance on how to complete the form within the report itself.

Please note that we will not consider any future funding requests from your organisation without this report.

### Reports for Capital Grants

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Please refer to the conditions in your award email for reporting requirements. In most cases, we will ask you to complete our standard End of Grant Report. If there are any additional reporting requirements for your capital grant, we will agree these with you at the point of award.

**Please contact the Giving Team on 0141 353 7300 or [funding@therobertsontrust.org.uk](mailto:funding@therobertsontrust.org.uk) if you have any questions about completing your report.**