



Making Roads Safer

# Grant Reporting Requirements



## Your Terms and Conditions Acceptance Form sets out the reporting and payment schedule for your grant.

We use progress reports to review grant spending and the project's achievement towards the stated objectives. Interim Progress Reports are due one month before each scheduled payment point. The Final Project Report is approved by our Trustees, which can take up to two months to review and finalise; after it is approved it will be published on our website and the RSGB Knowledge Centre. The final payment of no less than 10% of the total award will be released when this process is complete. **Please note that if you do not submit your report by the date it is due, then payment will be delayed.**

As part of reviewing grant progress, we may request additional information or arrange to discuss your project further with you by phone or at a meeting.

Where possible please supply supporting evidence with your progress reports related to achievement of the project's milestones. If there are any changes to the project objectives, activities, milestones and outputs, and adjustments to the budget lines, these should be discussed and agreed with the Trust in advance. Please note that payments are generally made in arrears unless otherwise agreed in your Grants Schedule with your Grants Manager. **Payment may be withheld if there are significant changes which have not been agreed with us.**

Where appropriate, the Trust retains the right to alter these requirements as it seems fit depending on the nature of the project.

## Definitions

We use the following definitions in our reporting requirements:

**Aim:** The overall issue you want to address: what or who you hope to change by the project.

**Objectives:** Summary statements of what your project will do to achieve this aim (should be specific, measurable and achievable).

**Activities:** Actions that will be undertaken to achieve the aims, objectives, and project outputs. Plans and methods for collecting information and monitoring, analysing and assessing your road safety outcomes should also be included here.

**Milestones:** These are the stages of the project or delivery of a discrete piece of work.

**Outputs:** What your project will produce or deliver – e.g. a report or a road safety tool or resource.

## Reports and outputs expected by The Road Safety Trust

The following lists the reports and outputs that are required as part of your grant terms. On the Grantee section of our website you will find further guidance; if you would like to deviate from the suggested structure in the guidance documents, please discuss this with your assigned Grants Manager.

- **Interim progress reports:** Submission dates are agreed upon between the grants team and the project team, and can be found in your Grant Schedule on the Terms & Conditions Acceptance form. Guidance on the headings to include in these interim updates can be found later in this document and a link from the Grant Portal will be emailed to the lead contact to upload reports approximately a month before the due date. Interim progress reports are used internally to review grant progress and release payment instalments.
- **Final progress report:** Submission dates are agreed upon between the grants team and the project team, and can be found in your Grant Schedule on the Terms & Conditions Acceptance form. Guidance on the headings to include in the final update can be found later in this document and a link from the Grant Portal will be emailed to the lead contact to upload reports approximately a month before the due date. The final progress report is used internally to assess if the project has achieved its objectives and how the funding was used. The final payment is released when the Final Project Report and final progress report have been approved.
- **Final Project Report:** A public document published on our website that details your project's aims, objectives, activities, findings and recommendations (this is in addition to project specific outputs such as tools, resources or a website and is separate from the progress reports<sup>1</sup>). **All RST projects must produce a Final Project Report.** Please refer to guidance on the Grantee section on our website when writing this report.
- **Knowledge Sharing Plan Template:** It is important to share the knowledge and outputs from your project to support implementation into practice, influence policy and impact on road safety. We have developed a toolkit that can be found on the Grantee section of our website for you to plan your dissemination and communications, which includes information on how we can help you with this.
- **Project Briefing Report** Depending on the project, RST might also require a Project Briefing Report in addition to the Final Project Report to help project findings reach the necessary stakeholders. Guidance for writing the Project Briefing can be found on our website. While the project team will provide the content, these reports will be designed by us into a standard format.

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<sup>1</sup> If you require additional support with producing these reports, for example with design costs, please contact your grants manager.

## Interim Progress Reports

As a guideline, interim progress reports should be around four sides of A4, depending on the size and complexity of the project. Reports should cover the following points:

1. **Objectives:** Provide a brief summary of how you are on track to achieve the project's objectives. This should include a description of activities, milestones and outputs for the reporting period. If these have changed, please explain why and please note that this should be agreed with The Road Safety Trust in advance.
2. **Budget:** Provide a breakdown of income and expenditure for the whole project for the reporting period against the original budget, explaining any differences. Please separately identify spending against the elements funded by the RST. This should provide details of all expenditure items and a breakdown of staffing and other costs. Acceptable formats are a table within the body of the report or a separate Excel spreadsheet.
3. **Budget for the next reporting period:** Provide a breakdown of anticipated income and expenditure for the funded work for the next reporting period, confirming which income is secured. Please separately identify the elements to be funded by the RST. If there are any changes to the original budget, please highlight clearly and explain.
4. **Accounts:** Provide a copy of or link to your organisation's latest audited or approved accounts and annual report (if you have not already sent them), as required by the relevant accounting framework. (Not required for statutory bodies or universities).
5. **Risk:** Outline any risks that have been identified which could delay or have an impact on the project.
6. **Publicity:** Outline any publicity that has been undertaken. (Please refer to our guidelines around publicity in our Terms & Conditions).
7. **Plans for next reporting period:** Please provide a brief update on your plans, which your Grants Manager will discuss with you on receipt of the report.
8. **Knowledge Sharing Plan Template (if required during the reporting period):** Your assigned Grants Manager will discuss with you the timing of this plan and you will be provided with a template.

## Final Progress Report

A final progress report should be submitted by the date set out in the Reporting and Payment Schedule (which shall be no more than 2 months after the end of the project activities) and should cover the following:

1. **Objectives and outcomes: Please describe how the project has met its objectives.** Has the project generated new knowledge about what works, translated ideas into new measures or influenced road safety policy and practice? Has it supported partnership working and collaborations?
2. **Activities, milestones and outputs:** Provide a **brief** description of the project activities that have taken place and key milestones and outputs that have been achieved throughout the grant. If these have changed, please explain why and please note this should be agreed with The Road Safety Trust in advance.
3. **Final Budget:** Provide a breakdown of income and expenditure for the whole project for the grant against the original budget, explaining any differences. Please separately identify the elements funded by the RST. This should provide details of all expenditure items and a breakdown of staffing and other costs.
4. **Accounts:** Provide a copy of or link to your organisation's latest audited or approved accounts and annual report, as required by the relevant accounting framework. (Not required for statutory bodies).
5. **Risk:** Outline any risks that have been identified that could have an impact on the ongoing achievement of the project's aims and objectives.
6. **Publicity:** Outline any publicity that has been undertaken. (Please refer to our guidelines around publicity in our terms and conditions).
7. **Your Organisation:** We are interested in the impact of the work we have funded on your organisation.