



## Grant Reporting Requirements

### Introduction

Your Terms and Conditions Acceptance Form sets out the reporting and payment schedule for your grant. Reports are due one month before each scheduled payment.

If there are any changes to the project objectives, activities, milestones and outputs these should be discussed and agreed with the Trust in advance. Payment may be withheld if there are significant changes which have not been agreed with us.

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. Please note that if you do not submit your report by the date it is due, then payment will be delayed.

Where possible please supply supporting evidence with your progress reports related to achievement of the project's milestones.

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

### Payment of grant

Payments will be made on receipt of satisfactory progress reports. A final payment of no less than 10% of the total award will be made on receipt of a satisfactory final progress report and the final project outputs at the end of the project.

### Definitions

We use the following definitions to describe our reporting requirements:

Objectives: These are the specific results you hope to achieve from the project as set out in your application.

Activities: These are the activities that you will carry out in order to achieve the aims of the project.

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

Outputs: We use the word 'output' to mean the project deliverables – e.g. a report or road safety tool.

## Interim reports

As a guideline, reports should be around four sides of A4, or slightly more or less 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 the elements funded by the RST. This should provide details of all expenditure items and a breakdown of staffing and other costs.
- 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, 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 and 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. Dissemination Plan (if required during the reporting period):** Your Grants Manager will discuss with you the timing of this plan and you will be provided with a template



## Final Reports

A final report should be submitted 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. Project Summary:** Please provide a short summary (around one page) of the project and its road safety benefits, in non-specialist language, that can be put on our web-site or shared with other organisations. (This may be the Executive Summary of any published reports)
- 4. Project Reports:** Please provide a copy of any reports that form all or part of the project outputs. Please refer to our guidance on Project Reports which describes the key features which must be included and seek advice from your Grants Manager.
- 5. Dissemination:** Describe the activity that has taken place to share learning and the project outputs.
- 6. Next Steps:** Please tell us what you plan to do next in relation to the funded project to disseminate the outputs and achieve impact
- 7. 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.
- 8. 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).
- 9. Risk:** Outline any risks that have been identified that could have an impact on the ongoing achievement of the project's aims and objectives.
- 10. Publicity:** Outline any publicity that has been undertaken. (Please refer to our guidelines around publicity in our terms and conditions).

**11. Evaluation:** Describe what activity has taken place to measure the effectiveness of the project and what you have learnt. If an evaluation report is an agreed output of the project, please provide a brief summary of the main findings.

**12. Your Organisation:** We are interested in the impact of the work we have funded on your organisation.