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We hope you find this form straightforward to complete. If you have any problems with completing it, please contact us on 020 7632 9060. There is a help link in the bottom left hand corner of this page which will take you to our email address ([general@barrowcadbury.org.uk](mailto:general@barrowcadbury.org.uk)).

This form is for you to tell us about how you have spent your grant, how the project has gone and the changes you have achieved or contributed to. It has several pages. You can preview them by clicking the links at the top of each page.

You can either type directly into the form or, if you prefer, you can cut and paste from another application such as Word. You are strongly advised to save your form regularly. We suggest, as a minimum, that you do this when you complete each page. To save your form, use the hyperlinks at the top and bottom of the form. You will be asked for a password and, once you've saved the form, you will be sent an email with a link to your form and a note of your password. We do not have access to your password, but if you forget what it is, you can reset it yourself or ask us to send you a new password.

Many of the fields in the form are compulsory. These are marked with a red asterisk. If you do not complete compulsory fields, you will not be able to submit your report to us.

On the last page of the form we ask you to upload a report of how you have spent your grant. If you wish, you can use the Barrow Cadbury Trust's [budget report form](#), or you may prefer your own format.

Once you have completed the form and uploaded your documents, click on the "Submit" button. Your complete form will appear on the screen for you to review. You can also print the form for your records at this stage. Once you are happy with it, click the "Confirm" button. You will receive an email acknowledgement with a copy of your form once you have successfully submitted it.

Please save your form regularly to ensure you do not lose any work using the links at the top and bottom of the page. Please note that your form is not automatically saved when you complete a page.

We look forward to reading about how your project has gone.

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### Organisation and project details

Your name Your job title Organisation (please do not edit this field)  
**SAMPLE SAMPLE SAMPLE**

Your email address Your phone number  
**[SAMPLE@SAMPLE.ORG.UK](mailto:SAMPLE@SAMPLE.ORG.UK) 0123456789**

According to our records, your project planned to/ended on the following date:

If your project is now scheduled to end on a different date, please give details here  
**SAMPLE**

## Progress with your project

Activities undertaken since your last report to us (max 250 words)

### **SAMPLE**

If this was different from the plan you have previously told us about please provide details here. (200 words max)

### **SAMPLE**

Your plans for continuing the work, if applicable. (max 200 words)

### **SAMPLE**

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### Outcomes Monitoring

Your project should be working towards at least one of the following outcomes:

#### Equality & Diversity programme:

- SI intermediaries and infrastructure organisations take actions to increase diversity and inclusion in social investment sector.
- Diverse voices in the social investment market are maintained and strengthened.
- The need for appropriate support and products to enable groups experiencing barriers to access social investment is addressed.

#### Business Support Development programme:

- The market infrastructure is better equipped to respond to the business support needs of charities and social enterprises as they address the impacts of Covid-19 on their organisation.
- There is better understanding in the market about how products and services can support and build resilience of charities and social enterprises responding to the impact of the crisis.
- Learning is shared about how intermediaries and infrastructure organisations can provide cost effective business support to the sector.
- More knowledge is gathered about the characteristics of greater resilience which make organisations more able to respond and adapt effectively in crisis circumstances (e.g. business model, capacity, culture, etc.).

Which of the above outcomes was your project looking to achieve and how well do you believe the project did this?

### **SAMPLE**

Please describe the main barriers/ challenges experienced in achieving the expected outcomes, if any.

### **SAMPLE**

How have you dealt with those barriers/challenges?

### **SAMPLE**

What have you learned from your experience? And how could you share that learning?

### **SAMPLE**

If your grant involved working with charities or social enterprises (VCSEs), how many organisations have you directly worked with during the period covered by the grant? And

how many indirectly? (100 words max)

**SAMPLE**

How many new networks, collaborations or partnerships have been developed through Connect Fund support?

**SAMPLE**

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### State of the Social Investment Sector

In your experience of working with SI intermediaries, do you believe boards and committees in SI intermediaries have become more diverse since the beginning of this grant? (100 words max)

**SAMPLE**

Do you believe that diversity, since the beginning of this grant, is now a more widely considered issue? (100 words max)

**SAMPLE**

Have you experienced, since the beginning of this grant, an increase of financial products which are more suitable to diverse-led organisations, or organisations supporting diverse communities/ beneficiaries? If so, please give example of financial products you have come across on your research, or products which groups you support have accessed recently. (150 words max)

**SAMPLE**

Do you believe the Connect Fund has supported the creation of new products, platforms or resources, which support access to, and sustainability of the market? (150 words max)

**SAMPLE**

Do you believe, since the beginning of this grant, that VCSE organisations are better supported to take on repayable finance and/or social investment? If barriers still exist to supporting VCSEs to access social finance, what are they and what's needed to overcome them? (200 words max)

**SAMPLE**

Do you believe, since the beginning of the grant, that there is better understanding in the market about how products and services can support and build resilience of charities and social enterprises responding to the impact of the crisis? (200 words max)

**SAMPLE**

Do you believe, since the beginning of the grant, that there are more resources available in the market, such as case studies and toolkits, which inform the characteristics of greater resilience which make organisations more able to respond and adapt effectively in crisis circumstances (e.g. business model, capacity, culture, etc.)? (150 words max)

**SAMPLE**

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## Budget and finances

Total expenditure from your Barrow Cadbury grant since it started.

**1000**

If you have an over- or under-spend, please explain why (150 words max)

**SAMPLE**

Please provide us a report on what you have spent compared to the original budget you submitted to us. You can either download and use the budget spreadsheet via the link on the introductory page of this form, or provide your budget in a different format that contains the same information. Once you have prepared your budget report, upload it using the button below:

**Interim-budget-form-Management-stage-November-2017 (2).xlsx**

Unless you are a public body or statutory organisation (such as a university or local authority), we require a set of annual accounts that have been approved and signed by your Trustees for every year in which you receive a grant payment from us. The year end date for the most recent set of accounts we have on file is (please do not edit this field):

If your Trustees have approved a more recent set of accounts please attach them here:

If you wish to attach any additional documents (such as an evaluation or a final report of the project), please add them here:

If there have been any significant changes to your organisation in the last six months, please give details here. By significant changes we mean changes to the people working on the project, to the senior management or trustee body, or to the legal status of your organisation. Please note that we expect to hear of such changes at the time they occur rather than waiting until writing your progress report, but if there is anything you have not yet told us, please include it here..

**SAMPLE**

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### Dealing with the unexpected

Did anything happen during the course of your project that required a response from you to keep the project on track? And if it did, how did you deal with it?

**SAMPLE**

Did anything happen in the external environment that had an impact on your organisation or beneficiaries during your project?

**SAMPLE**

Has the funding from Barrow Cadbury brought about any other changes to your organisation?

**SAMPLE**

### And finally...

**The Trust is an accredited [Living Wage Employer](#) and a [Living Wage Friendly Funder](#).** This means that we have committed to encouraging and supporting those we fund to become Living Wage Employers.

The Living Wage is set each year by the Living Wage Foundation and is enough to cover the basic cost of living in the UK. Living Wage Employers choose to pay their staff the Living Wage, which is higher than the legal "living wage" set by the Government that all employers will have to pay from April 2016. The Living Wage is currently £10.85 in London and £9.50 in the rest of the country. This is equivalent to £19,747 in London and £17,290 in the rest of the UK for a 35 hour week.

Being or working towards becoming a Living Wage Employer is not a condition of our funding, but we are collecting statistics on how many of our applicants and grant-holders are Living Wage Employers so that we can track any changes over time. This information is for our internal purposes only and will not form part of our assessment of any future grant you may hold with us.

Are you currently a Living Wage Accredited organisation?

**- No**

Do any of your employees currently earn less than the Living Wage (£9.15 per hour in London and £7.85 in the rest of the country, or £16,717 in London and 14,342 in the rest of the UK for a 35 hour week)?

**- Yes**

Is your organisation currently considering becoming a Living Wage Employer?

**- No**

Environmental sustainability is important to all of us. Tell us one thing (or more) that your organisation is doing to reduce its carbon footprint.

**SAMPLE**

Please tell us one thing you have valued (other than the funding we provided) about your relationship with Barrow Cadbury

**SAMPLE**

And if you were to change one thing, what would it be?

**SAMPLE**

When you click on "Submit, below, you will see a copy of your form to check. At the end you'll find a "Confirm" button which will submit the form to us.

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*Attached File:*

Interim-budget-form-Management-stage-November-2017 (2).xlsx (18 KB)