

Page 1 (Page 1 / 5)

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).

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 application 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.

Page 2 (Page 2 / 5)

Organisation and project details

Your name Your job title
SAMPLE SAMPLE

Your organisation (please do not edit this field)
SAMPLE

Your phone number
01234456789

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

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 tell us the new date and the reason for the change

SAMPLE**Progress with your project**

Activities undertaken since your last report to us, or since the start of your grant if this is your first progress report (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 (including key dates if you are publishing reports or holding events etc. as part of this grant) for the next six months (max 250 words)

SAMPLE**Page 3 (Page 3 /5)****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.).

What has the project achieved against these outcomes so far? (max 200 words)

SAMPLE

What have the main barriers/ challenges been in achieving the expected outcomes, if any? (max 200 words)

SAMPLE

How have you dealt with those barriers/challenges? (max 200 words)

SAMPLE

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

SAMPLE

How many new networks, collaborations or partnerships have been developed through Connect Fund support? (max 150 words)

SAMPLE

What are the main needs of the sector at the moment? Have you identified any new or emerging needs since the beginning of this project? (max 250 words)

SAMPLE

Page 4 (Page 4 / 5)

Budget and organisational change

Total expenditure from your Barrow Cadbury grant since it started.

1000

If you have an over- or under-spend, please explain why. If the underspend is due to a project delay of more than one month, please explain the impact this will have on the expenditure of your grant. If activity is significantly different from your original timeline we will discuss rescheduling your reporting schedule so it dovetails with your activities and expenditure (200 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](#)

If there have been any significant changes to your organisation in the last six months, please give details here (max 250 words).

SAMPLE

Page 5 (Page 5 / 5)

Your organisation's finances

In order to assess your organisation's financial health we need some details of how your organisation's financial situation has changed since the end date of your most recent approved accounts:

1 Have you lost or gained any significant contracts, grants or other sources of funding? If so, please give details here. If nothing significant has changed, please write "none".

SAMPLE

2 If you are more than six months from your financial year end, please tell us your total anticipated organisational expenditure for the current year. If you are less than six months

from your financial year end, please tell us your anticipated expenditure for this year and the coming year.

SAMPLE

3 How much of that anticipated expenditure you have secured to date, and what are your plans for achieving any remaining unsecured balance?

SAMPLE

4 What will your organisation do if it does not secure the balance of funding needed?

SAMPLE

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:

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.

Attached File:

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